

COMMUNITY SATISFACTION STUDY
REPORT ON SURVEYS OF RESIDENTS & BUSINESSES

PREPARED FOR THE
CITY OF LAKE FOREST



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1061 NEPTUNE AVENUE
ENCINITAS CA 92024
760.632.9900 WWW.TN-RESEARCH.COM



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INTRODUCTION

Located in the heart of South Orange County and the beautiful Saddleback Valley, the City of Lake Forest has been carefully managed to help ensure that it will always be an ideal place for businesses to prosper and for people to live, work, and play. Incorporated in 1991, the City's team of full-time and part-time employees provides a full suite of services through nine Departments—City Attorney, City Manager, Community Services, Development Services, Finance, Management Services, Police Services, Public Works, and Economic Development/Community Preservation.

As part of its commitment to provide high quality services and responsive local governance, the City of Lake Forest engages its residents and businesses on a daily basis and receives regular feedback on issue, policy, and performance matters. Although these informal feedback mechanisms are valuable sources of information for the City in that they provide timely and accurate information about the opinions of specific constituents and customers, they do not necessarily provide an accurate picture of the community as a whole. Informal feedback mechanisms typically rely on the customer to initiate the feedback, which creates a self-selection bias. The City receives feedback from only those individuals motivated enough to initiate the feedback process. Because these individuals tend to be either *very* pleased or *very* displeased regarding a particular topic, their collective opinions are not necessarily representative of the City's resident and business populations as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide the City with a *statistically reliable* understanding of the community's satisfaction, priorities, and concerns as they relate to services and facilities provided by the City of Lake Forest. Ultimately, the survey results and analyses presented in this report will provide Council and staff with information that can be used to make sound, strategic decisions in a variety of areas, including service improvements and enhancements, measuring and tracking internal performance, budgeting, policy, and planning.

To assist in this effort, the City selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Identify key issues of concern for residents and businesses.
- Measure overall satisfaction with the City's efforts to provide municipal services.
- Measure the importance of *specific* services to residents and businesses, as well as their satisfaction with the City's efforts to provide each service.
- Determine the effectiveness of the City's communication efforts.
- Gather opinions regarding potential capital improvements and policy-related matters.
- Collect additional background and demographic data relevant to understanding the perceptions, needs, and interests of residents and businesses.

This study is not the first statistically reliable resident and business ‘satisfaction’ study conducted for the City. Similar studies have been conducted every two years since 1998. Because of the interest in tracking the City’s performance in meeting the evolving needs of its residents and businesses, where appropriate the results of the current study are compared with the results of identical questions used in the prior surveys.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 69). In brief, a total of 400 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between November 20 and November 30, 2014. Survey participants were categorized into one of four geographic areas according to the location of their residence (see Figure 1 on the next page). The resident interviews averaged 20 minutes in length. The 18-minute survey of businesses was administered to a stratified random sample of 200 local business owners and managers between November 29, 2014 and January 9, 2015. Data collection was suspended for the Thanksgiving, Christmas, and New Year’s holidays.

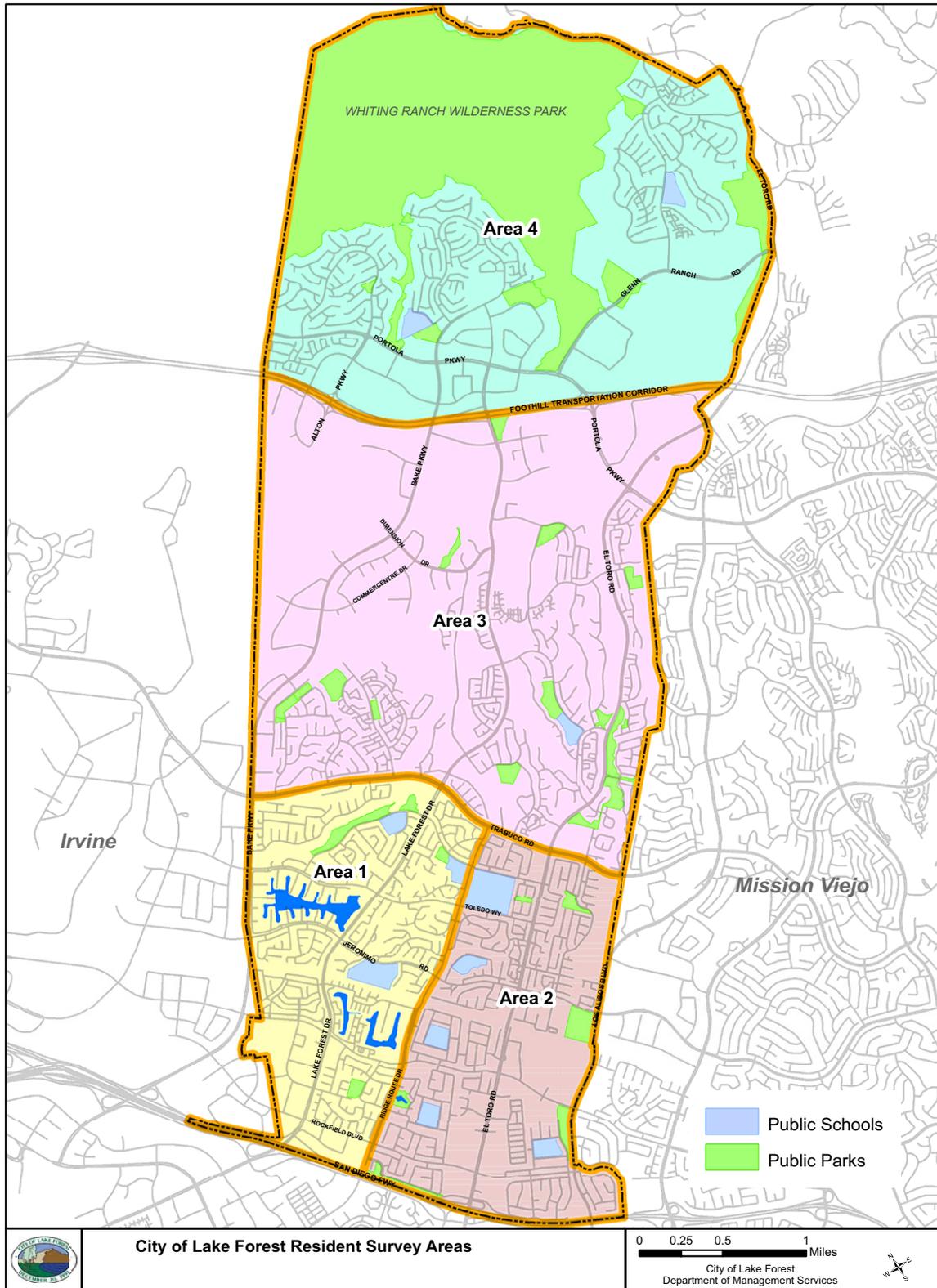
STATISTICAL SIGNIFICANCE As noted above, many of the figures and tables in this report present the results of questions asked in 2014 alongside the results found in previous surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify statistically significant changes between the 2012 and 2014 surveys. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies—as opposed to being due to chance associated with selecting two samples independently and at random. Statistically significant differences within response categories are denoted by the † symbol, which appears in the figure or table next to the appropriate response value.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the surveys by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaires used in the study are contained at the back of this report, and a complete set of crosstabulations for the resident and business surveys are contained in Appendix A and Appendix B, respectively.

ACKNOWLEDGEMENTS True North thanks the staff at the City of Lake Forest who contributed their valuable input during the design stage of this study. Their collective experience, local knowledge, and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the City of Lake Forest. Any errors and omissions are the responsibility of the authors.

FIGURE 1 MAP OF LAKE FOREST STUDY AREA



ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 900 survey research studies for public agencies, including more than 350 studies for California municipalities and special districts.



JUST THE FACTS

The following is an outline of the main factual findings from the 2014 study. For the reader's convenience, the findings are organized according to the section titles used in the body of this report. Thus, to learn more about a particular finding and how it may compare to findings from prior surveys, simply turn to the appropriate report section.

GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

- The overwhelming majority of residents shared favorable opinions of the quality of life in Lake Forest, with 55% reporting it is excellent and 37% stating it is good. Eight percent (8%) of residents indicated the quality of life in the City is fair, and only 1 of the 400 residents surveyed used poor or very poor to describe quality of life in the City.
- When businesses were asked to rate the business climate in Lake Forest compared with surrounding areas, 28% reported that it is excellent, 56% said it is good, and 14% offered that it is fair. Only 2% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor, and no one said it is very poor.
- When asked to indicate one thing city government could change to improve Lake Forest, more than one-third (37%) of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (21%) or desired no changes from the City (16%). Of the specific suggestions, the most common were reducing traffic congestion (14%), improving parks and recreation (11%), limiting growth and development (8%), improving and repairing city infrastructure (6%), and improving public safety (5%).
- When asked about what the City could do to improve the business climate in Lake Forest, more than half (51%) of business managers surveyed were either unsure of a change that could be made (28%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included increasing business and networking opportunities (12%), reducing signage restrictions (11%), improving or providing additional parking for customers (9%), improving the safety and security of business areas (8%), and reducing taxes and fees (7%).
- Approximately one-third (34%) of local businesses stated that there were no particular features of Lake Forest that benefit their business or that they could not think of any at the time of the interview. Among specific aspects mentioned, access to other local businesses and services (18%), having a convenient, easily-accessible location within the City (15%), Lake Forest's sense of community (11%), the minimal expense and ease of starting a business in Lake Forest (10%), and proximity to local freeways and surrounding areas of interest (9%), were mentioned most often.
- When asked if there were any particular challenges associated with doing business in Lake Forest, 71% of business managers surveyed said they could not think of any. The most common specific challenges cited were the location of the business and accessibility to freeways and surrounding communities (7%), advertisement and signage restrictions (5%), local business competition (4%), and general concerns about local regulations and restrictions (4%).
- The vast majority of residents (90%) and local businesses (87%) surveyed said that, overall, they were satisfied with the City's efforts to provide municipal services.

SPECIFIC SERVICES: RESIDENT SURVEY

- Among the services provided by the **Police**, residents rated maintaining a low crime rate as the most important service (91% extremely or very important), followed by investigating criminal activity (89%) and preparing for emergencies (78%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (96% very or somewhat satisfied), provide child safety programs (96%), and maintain a low crime rate (96%).
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided by the Department (56%), followed by enforcing zoning regulations (53%), issuing building permits (49%), and enforcing sign regulations (48%). Satisfaction ratings assigned to the four development services ranged from a low of 87% for enforcing zoning regulations to a high of 92% for inspecting buildings.
- Of the residents surveyed, just 8% had applied for a building permit, received a building inspection, requested code enforcement, or used any other service offered by the Development Services Department in the 12 months prior to the survey.
- Among the services provided by the **Public Works Department**, maintaining local streets and roads was viewed as the most important service (89%), followed by providing garbage collection services (88%) and reducing traffic congestion (82%). Residents were most satisfied with the Department's efforts to maintain parks and picnic areas (97%), provide street sweeping services (96%), maintain public landscapes (96%), provide garbage collection services (96%), and maintain trees (95%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to providing recreation programs for special needs children (72%), followed by providing recreation and sports programs for teens (66%), providing recreation and sports programs for elementary school-aged children (64%), and providing special events like concerts in the park and the Fourth of July Parade (62%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (92%), special events like concerts in the park and the Fourth of July Parade (92%), and recreation and sports programs for teens (92%).

SPECIFIC SERVICES: BUSINESS SURVEY

- Among **general city services** provided by the City to local businesses, participants in the business survey rated maintaining a low crime rate as the most important of the services tested (93% extremely or very important), followed by investigating criminal activity (86%). Promoting economic development (68%) and revitalizing outdated areas in the City (67%) were next in the list, although somewhat less important overall. At the top of the satisfaction scale was maintaining a low crime rate (95%), followed by providing building inspection services (95%), investigating criminal activity (95%), and providing business education events (94%).
- Among the **infrastructure-related services** provided by the City to local businesses, members of the business community rated maintaining local streets and roads as most important (80%), followed closely by reducing traffic congestion (77%). Street sweeping (52%), enforcing zoning regulations (49%), enforcing sign regulations (49%), and landscaping median strips and other areas of the City (48%) were viewed as somewhat less important. Overall, satisfaction was greatest with respect to the City's efforts to provide street sweeping services (98%), enforce zoning regulations (95%), landscape median strips and other areas of the City (95%), and maintain local streets and roads (95%).

RECREATION

- Among nine recreational amenities and facilities presented to residents, the highest-rated priorities were expanding and improving the network of walking, hiking, and biking trails (75% high or medium priority) and upgrading playground equipment at existing parks (73%). Providing off-leash dog park facilities (56%), a community swimming pool (54%), and additional sports courts (53%) were also popular.

TRAFFIC

- Residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (56%) of their trips. Trips on major streets in the City were slightly better, with an average of 45% involving bad congestion, compared with roughly 20% of trips in residential areas of the City.
- Most (84% of) residents surveyed felt that Lake Forest has either less than (45%) or about the same (39%) traffic congestion as neighboring Orange County cities. A minority (14%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities.
- About three quarters (72%) of residents indicated they were very (34%) or somewhat (38%) satisfied with the City's efforts to improve traffic circulation by improving roads and intersections, timing traffic signals, and other measures, whereas 26% were very (10%) or somewhat (16%) dissatisfied.
- Residents were asked, *If the City could fund only one traffic or transportation-related project, what should it be?* Almost a third (30%) of respondents were unsure or could not think of any traffic or transportation-related projects for funding. Adjusting the timing of traffic signals (22%) and making improvements and repairs to local streets (19%) were the most common specific suggestions, followed by a general desire for less traffic congestion (10%) and improved public transit services (10%). An additional 9% of residents surveyed said the City should not fund any transportation projects.

COMMUNICATION

- Eight-in-ten (82% of) residents surveyed said they were either very (44%) or somewhat (38%) satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means.
- Overall, 88% of local businesses indicated that they were satisfied with the City's efforts to communicate with them through newsletters, the Internet, social media, and other means.
- The single most frequently cited source of City information among residents was the Internet in general (22%). The City's newsletter, referred to in general (19%) and mentioned by name, *The Leaflet*, (18%) were the next most popular specific mentions, followed by the City's website (15%), the *Orange County Register* (8%), and the City's e-Newsletter (6%).
- Forty-four percent (44%) of residents surveyed in 2014 mentioned *at least one* of Lake Forest's newsletters as a source of City information.
- When asked what information sources they use to find out about City news, information, and programming, members of the business community were most likely to mention the City's website in general (25%), *The Leaflet* (24%), the e-Newsletter (23%), and the City newsletter in general (19%).
- Overall, 58% of businesses surveyed in 2014 mentioned *at least one* of Lake Forest's newsletters as a source of City information.

- Lake Forest business managers that direct mail to their office was the most effective method the City can use to communicate with their business (92% very or somewhat effective), followed by email (89%), e-Newsletters (89%), and the City's website (85%).
- Fifty-one percent (51%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Website visitors expressed high levels of satisfaction with the City's websites, with 88% of residents surveyed indicating that they were satisfied with the resources available on the sites.
- Twelve percent (12%) of residents surveyed indicated that they had visited the City's Facebook page in the past year.
- Overall, residents indicated that newsletters mailed directly to their home was the most effective method for the City to communicate with them (89% very or somewhat effective), followed by the City website (77%), email (72%), e-newsletters (71%), and a smart phone application (66%).
- Forty-two percent (42%) of local businesses indicated that they had visited the City of Lake Forest's economic development website (www.lakeforestbusiness.com).
- When asked to rate their level of interest in a variety of topics that could be addressed on the City's economic development website, local businesses expressed the highest levels of interest in a Shop and Dine directory of local businesses (83% very or somewhat interested), followed by Business and Financial resource guides (79%) and information on business seminars and workshops (74%).
- Business managers were also asked about their interest in attending a variety of seminars the City is considering. Businesses expressed the greatest interest in attending business networking events (73% very or somewhat interested), business marketing and sales seminars (72%), and social media and marketing seminars (65%).

BUSINESS BACKGROUND INFO

- When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, more than one-quarter (29%) indicated that it is close to the owner's home. Approximately 10% of respondents could not provide a response to this question, as the business was already in place when they became affiliated with it. Other specific reasons included the business' proximity to clients and potential customers (12%), overall quality of the City (10%), location and accessibility of the business within the City (9%), and proximity to freeways and surrounding communities (8%).
- Local businesses were generally optimistic about their future growth, with 59% anticipating growth and 37% expecting that their business would remain about the same. Just 3% indicated that they expect their business to decrease in the coming year.
- Among the 59% of businesses that anticipated growth, 13% indicated that they would require additional space whereas the remaining 46% were either unsure or did not anticipate needing additional space.
- Eleven percent (11%) of businesses surveyed anticipated relocating in the next year. Approximately half (6% of all businesses surveyed) of those expected to relocate to another community.



CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of Lake Forest with a statistically reliable understanding of the opinions, priorities, and concerns of Lake Forest residents and businesses. Operating from the philosophy that you can't manage what you don't measure, since 1998 Lake Forest has regularly used the survey as a community needs assessment and performance measurement tool. In short, the study presents an opportunity to profile residents' and local businesses' needs and priorities, measure how well the City is performing in meeting these needs through existing services and facilities, and gather data on a variety of quality-of-life, issue, and policy-related matters. More than just a profiling exercise, the City has been a leader in using the information gained from the studies to adjust and improve its services—all toward the goal of building and sustaining a high level of community satisfaction.

Whereas subsequent sections of this report are devoted to conveying the detailed results of the surveys, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

How well is the City performing in meeting the needs of Lake Forest residents and businesses?

Lake Forest residents and businesses continue to be quite satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life and business climate in the City.

Approximately nine-in-ten residents surveyed in 2014 indicated that they were satisfied with the City's overall performance in providing municipal services (90%) and offered positive ratings (excellent or good) for the quality of life in Lake Forest (92%). Although both of these metrics declined somewhat from the record highs recorded in 2012, the *intensity* of resident satisfaction recorded in 2014 remains well above the levels recorded when the City initially began measuring and tracking resident opinions on these matters. Specifically, the percentage of residents who indicated that they were *very* satisfied with the City's overall performance in providing municipal services has increased from 45% in 2000 to 57% in 2014, whereas the percentage who rated the quality of life in Lake Forest as *excellent* has increased from 46% (2004) to 55% (2014).

The high level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing specific services in most areas. For 31 of 33 service areas tested, the City is meeting or exceeding the needs and expectations of at least 85% of its residents (see Figure 32 on page 38)—and for more than two-thirds of services the City is meeting the needs of at least 90% of residents.

The results of the 2014 business survey displayed patterns similar to those noted above for the resident survey. Overall, 87% of local businesses stated they were satisfied with the City's efforts to provide municipal services, and 84% provided positive ratings for the business climate

in the city. Both metrics declined somewhat when compared to the record high levels set in 2012, although the *intensity* with which local businesses are satisfied with the City's performance has generally grown over time and was higher in 2014 than in all but one prior study. Indeed, the percentage of businesses that indicated they were very satisfied with the City's overall performance in 2014 was 61%, whereas the comparable figure in 2000 was 40%.

Where should the City focus its efforts in the future?

In addition to measuring the City's current performance, a key goal of this study is to look *forward* and identify opportunities to adjust services, improve facilities, and/or refine communications strategies to best meet the community's evolving needs and expectations. Although resident and business satisfaction in Lake Forest is quite high (see above), there is always room for improvement. Below we note some of the areas that present the best opportunities in this regard.

Considering respondents' verbatim answers regarding what they feel city government could do to make Lake Forest a better place to live and work (see *Ways to Improve Lake Forest* on page 16), as well as the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 36), the top priorities for residents are reducing traffic congestion, improving parks and recreation, and managing growth & development/enforcing zoning regulations. For local businesses, the top priorities are reducing traffic congestion, increasing business networking opportunities, enforcing/reducing sign restrictions, and revitalizing out-of-date areas in the city.

With the recommendation that the City focus on these areas, it is equally important to stress that when it comes to improving satisfaction in service areas, the appropriate strategy is often a combination of better communication and actual service improvements. It may be, for example, that many residents are simply not aware that the city has recently expanded its recreation facilities (sports park) and recreation programming. Choosing the appropriate balance of actual service improvements and efforts to raise awareness on these matters will be a key to maintaining and improving the community's overall satisfaction in the short- and long-term.

It is also important to keep in mind that although these areas represent opportunities to improve resident and/or business satisfaction, the city should *not* oversteer. Indeed, the main message of this study is that the City does many things exceptionally well and the emphasis should be on continuing to perform at a high level in these areas. The vast majority of residents and businesses were pleased with the City's efforts to provide services, programs, and facilities and have a favorable opinion of the City's performance in virtually all areas. The *top priority* for the City

should thus be to do what it takes to maintain the high quality of services that it currently provides.

How have concerns about traffic congestion varied over time?

One of the clear themes that stands out in the 2014 study is traffic congestion. Prior to the recession, traffic congestion was the dominant concern of Lake Forest residents and businesses alike. In 2006, for example, nearly one-in-four residents (24%) cited traffic congestion as the most important issue facing the City, and 29% indicated they were dissatisfied with the City's efforts to reduce traffic congestion. As the economy soured in 2008 and then fell into a deep recession, concerns about the economy, jobs market, and economic development began to overshadow other issues in the minds of many residents—in Lake Forest as well as other cities throughout California. The recession was also associated with lighter peak-period traffic conditions in many areas due to higher unemployment, as well as a virtual halt to new construction. During the heart of the recession in 2010, just 15% of Lake Forest residents cited traffic congestion as the most important issue facing the City, and the percentage who indicated that they were dissatisfied with the City's efforts to manage traffic congestion declined to 23%.

With the economy near full recovery, low unemployment, and construction regaining traction, concerns about traffic congestion have begun to return to their former levels. When asked what city government could do to make Lake Forest a better place to live, reducing traffic congestion (14%) was the top specific response in 2014 among residents. Moreover, although the vast majority of residents (73%) and businesses (77%) indicated in the current study they were generally satisfied with the City's efforts to reduce traffic congestion, these percentages were significantly lower in 2014 than two years prior.

Although the City's ability to manage traffic congestion is limited and residents generally perceive that Lake Forest has less (45%) or about the same level (39%) of traffic as in other Orange County cities, the survey results do indicate that residents and businesses would approve of the City exploring ways to make improvements in this area—especially on major streets in Lake Forest. Synchronizing traffic signals, in particular, was the traffic or transportation-related improvement most desired by residents. For more on the subject of traffic, turn to *Traffic* on page 41.

How well is the City communicating with residents and local businesses?

The importance of City communication with residents and local businesses cannot be overstated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the city to the community and from the community to the city. This study is just one example of Lake Forest's efforts to enhance the information flow to the City to better understand the community's concerns, perceptions, and needs. Some of the City's many efforts to communicate with its resi-

dents and local business community include its newsletters, timely press releases, street banners, Facebook presence, and its various websites.

In True North's experience, a high level of satisfaction with a city's communication efforts is generally associated with (and likely caused by) a greater reliance among residents and businesses on *city-sponsored* sources of information such as newsletters, websites, and related publications. This pattern partly explains the divergent trends in satisfaction with city communications found among Lake Forest residents and businesses in 2014.

Among Lake Forest *businesses*, city-sponsored sources were the most frequently mentioned when asked where they turn to find out about Lake Forest news, information and programming—including the City's website (25%), *The Leaflet* (24%), electronic newsletter (23%), and a general reference to the City's newsletter (19%). Reliance on the City's newsletter also appears to have increased during the past two years. Not coincidentally, satisfaction with the City's efforts to communicate with local businesses was higher in 2014 (88%) than ever before.

Among *residents*, however, there was a significant decline during the past two years in those who mentioned the City's newsletters (-18%) and websites (-5%) when asked where they turn for Lake Forest news, information and programming. Reliance on non-city sources was especially pronounced among younger residents (under 30). The impact of this change in information sources was a softening of resident satisfaction with city-resident communication in 2014. Although 82% of respondents indicated they were satisfied with the City's efforts to communicate with residents, the percentage who stated they were *very* satisfied declined significantly (-8%) during the past two years.

Although newsletters are still the most effective means of communicating with residents (see *Communication Preferences* on page 58), the reality is that residents' preferences for communication are growing increasingly diverse. Whereas older residents (50+) continue to rely heavily on newsletters and printed forms of communication, younger residents show great interest in digital forms of communication. In particular, residents under the age of 50 were especially interested in a Lake Forest smart phone application. Overall, 43% of Lake Forest residents indicated that a smart phone app would be a *very* effective means of communicating with them, which was second only to newsletters mailed to the home. Of course, be it a smart phone app, website or other digital source, keeping the site's content dynamic, relevant and interesting is both the primary challenge and the key to having residents continually refer to the source.

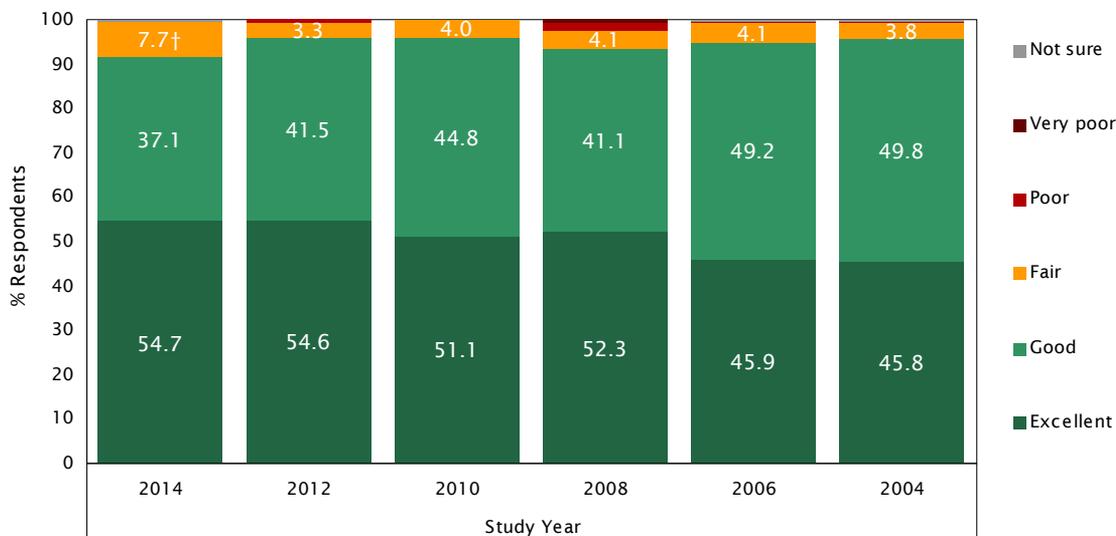
GENERAL PERCEPTION OF CITY & LOCAL ISSUES

The opening series of questions in the resident and business surveys was designed to gather top-of-mind perceptions about the quality of life in Lake Forest and the business climate, residents' and business managers' satisfaction with the City's overall performance, as well as their ideas for what city government could do to improve the quality of life and improve the business climate in the City.

QUALITY OF LIFE At the outset of the resident survey, respondents were asked to rate the quality of life in the City, using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 2 below, the overwhelming majority of respondents shared favorable opinions of the quality of life in Lake Forest, with 55% reporting it is excellent and 37% stating it is good. Eight percent (8%) of residents indicated the quality of life in the City is fair, and only 1 of the 400 residents surveyed used poor or very poor to describe quality of life in the City. Between the 2012 and 2014 study, there was a statistically significant increase in the percentage of residents who cited the quality of life as *fair*.

Question 2: Resident Survey *How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 2 OVERALL QUALITY OF LIFE: RESIDENT SURVEY (2014 ~ 2004)



† Statistically significant difference ($p < 0.05$) between the 2012 and 2014 studies.

Figures 3 and 4 on the next page show how ratings of the quality of life in the City varied by years of residence in Lake Forest, presence of a child in the home, household income, gender, age of the respondent, home ownership status, and area of the City. Although there was some variation in opinion (e.g., long-time residents were more likely than their counterparts to cite the quality of life as excellent), the most striking pattern in these figures is the relative consistency of opinion. Regardless of subgroup category, at least eight-in-ten respondents held a very positive assessment of the quality of life in Lake Forest.

FIGURE 3 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER

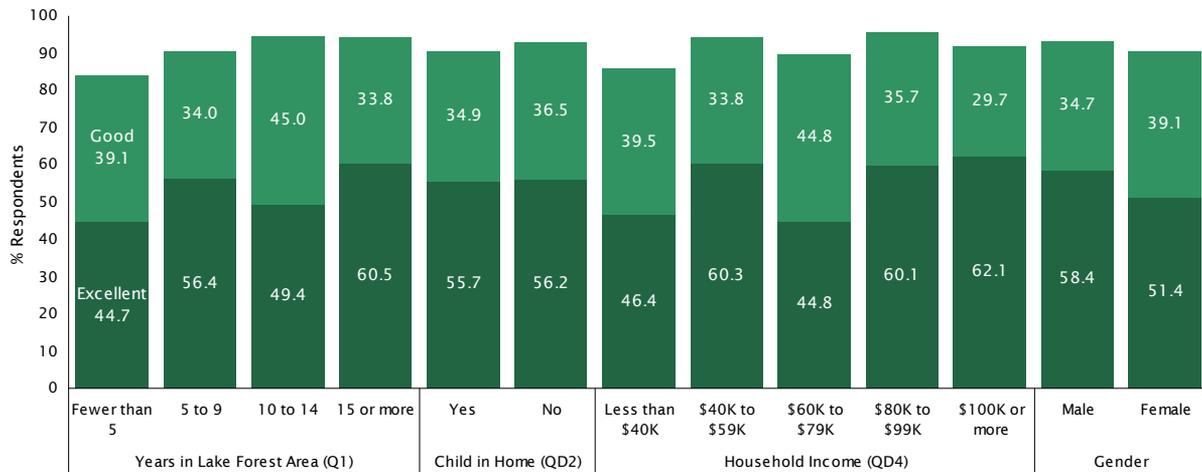
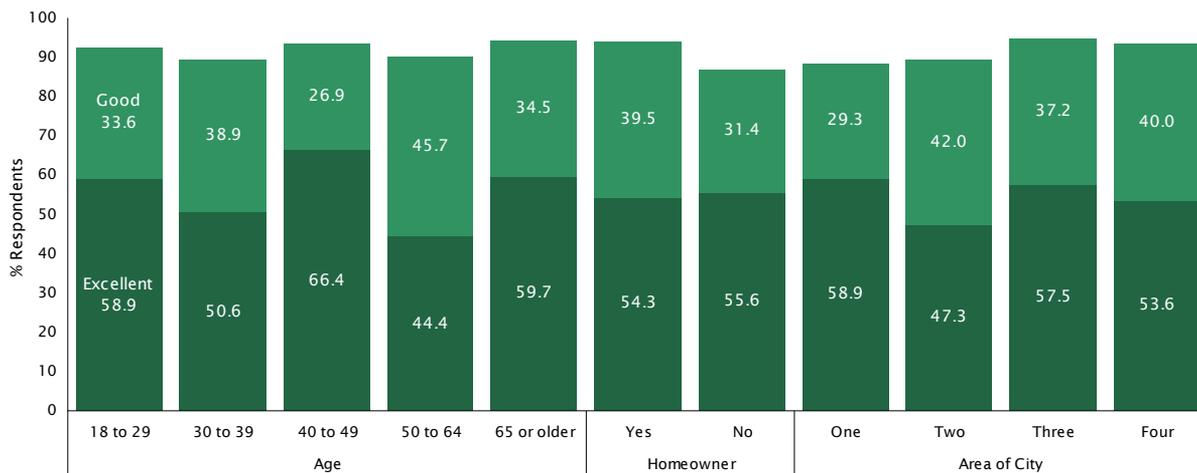


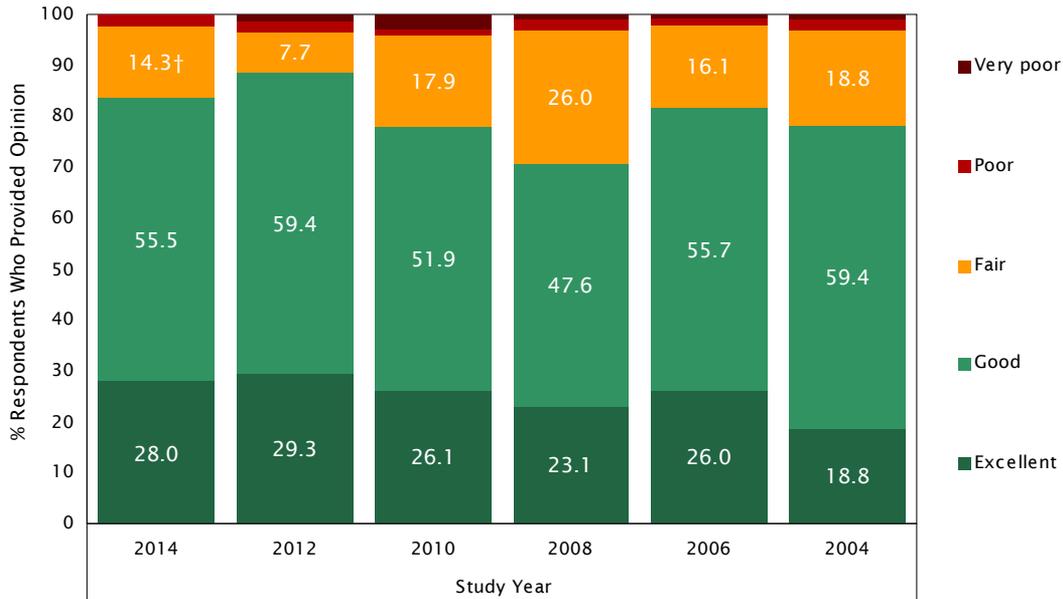
FIGURE 4 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY AGE, HOMEOWNER & AREA OF CITY



BUSINESS CLIMATE Respondents in the business survey were asked to rate the business climate in Lake Forest in comparison to other cities in the area, using the same five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 5 on the next page, most respondents shared a favorable opinion of Lake Forest’s business climate. Overall, 28% reported that it is excellent, 56% said it is good, and 14% offered that it is fair. Only 2% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor, and no one said it is very poor. From 2012 to 2014 there was a statistically significant increase in the percentage of respondents who used *fair* to describe the business climate in Lake Forest.

Question 2: Business Survey How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

FIGURE 5 QUALITY OF BUSINESS CLIMATE (2014 ~ 2004)



† Statistically significant difference ($p < 0.05$) between the 2012 and 2014 studies.

Figures 6 and 7 show how respondents' rating of the business climate in the City was related to the years the business has operated in the City, the type of business they operate, whether the respondent was also a Lake Forest resident, the number of individuals employed at their business, and if any of their employees live outside the City of Lake Forest. The vast majority of respondents in each subgroup rated the business climate as excellent or good.

FIGURE 6 QUALITY OF BUSINESS CLIMATE BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY

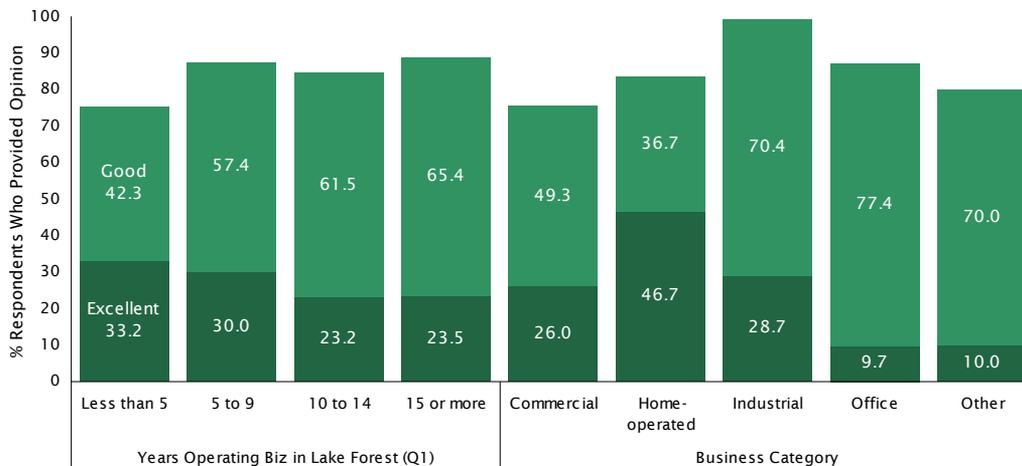
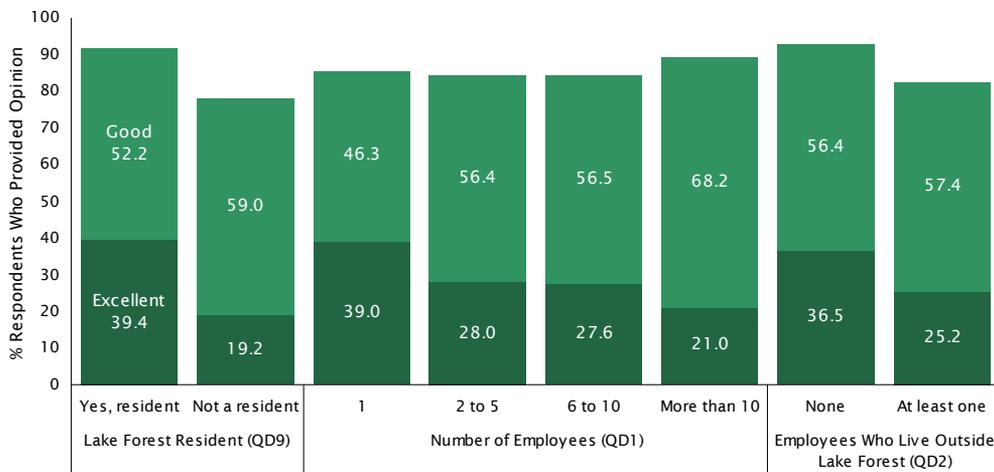


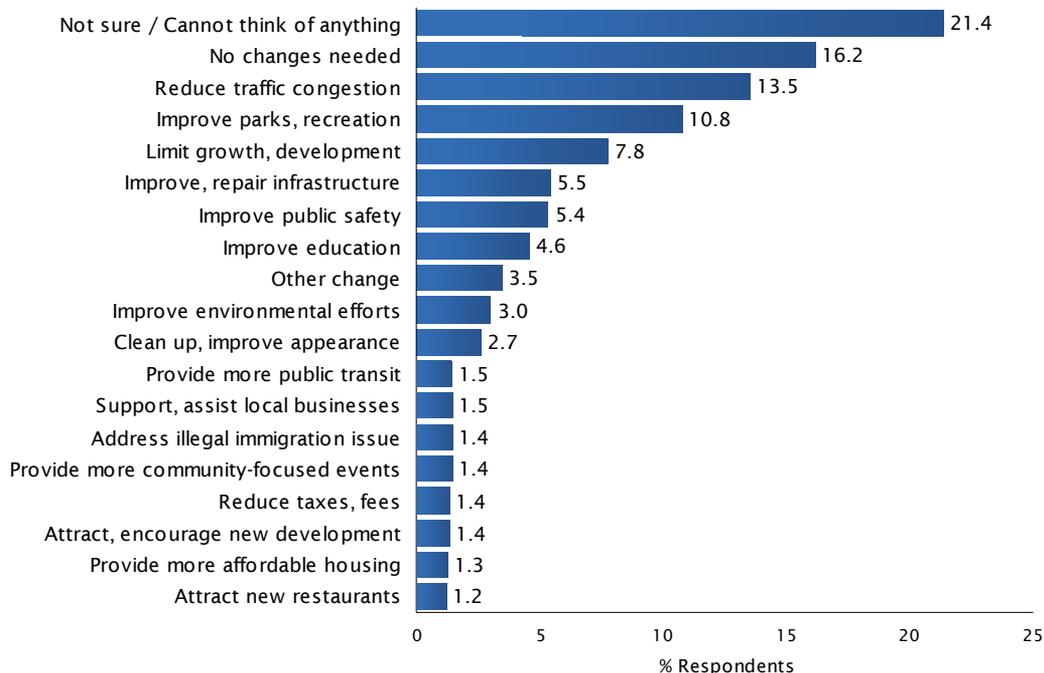
FIGURE 7 QUALITY OF BUSINESS CLIMATE BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST



WAYS TO IMPROVE LAKE FOREST Residents and business managers were next asked to indicate one thing city government could change to improve Lake Forest. For residents, the question focused on improving the City as a place to live, now and in the future. Business managers were asked more specifically about ways to improve the business climate. These questions were asked in an open-ended manner, allowing respondents to mention any change that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in the next two figures.

Question 3: Resident Survey *If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see?*

FIGURE 8 CHANGES TO IMPROVE CITY

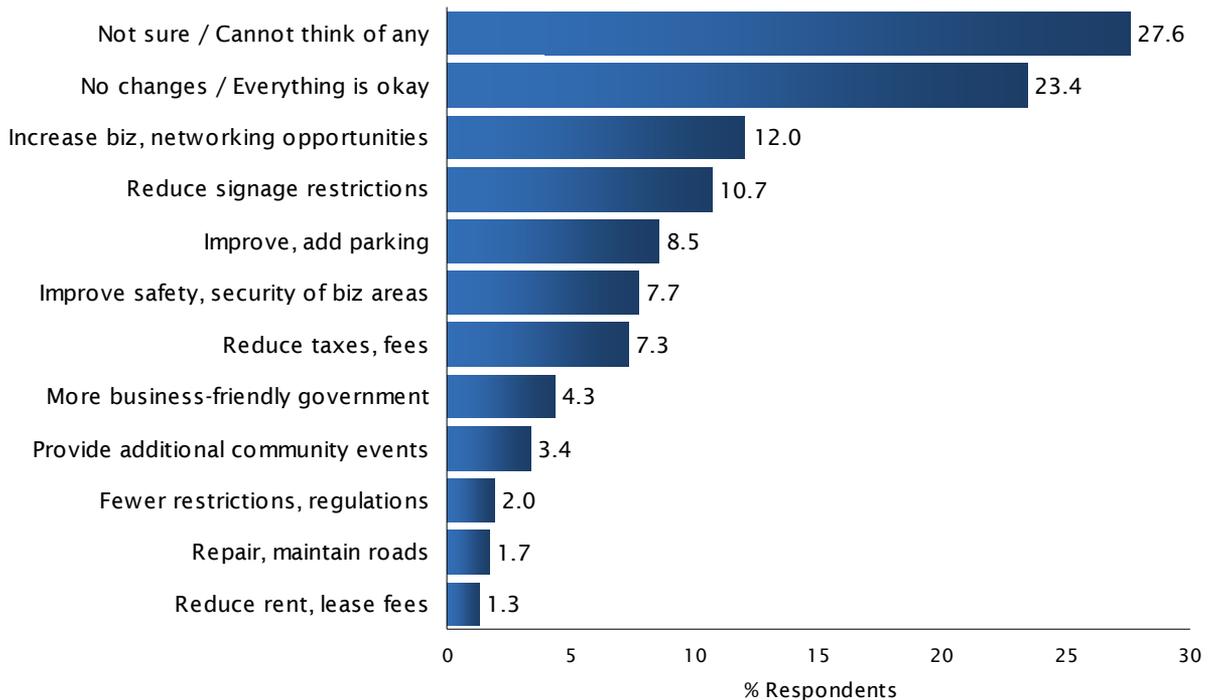


As shown in Figure 8 on the previous page, more than one-third (37%) of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (21%) or desired no changes from the City (16%). Of the specific suggestions, the most common were reducing traffic congestion (14%), improving parks and recreation (11%), limiting growth and development (8%), improving and repairing city infrastructure (6%), and improving public safety (5%). No other single improvement was mentioned by at least 5% of respondents.

When asked about what the City could do to improve the business climate in Lake Forest, more than half (51%) of business managers surveyed were either unsure of a change that could be made (28%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included increasing business and networking opportunities (12%), reducing signage restrictions (11%), improving or providing additional parking for customers (9%), improving the safety and security of business areas (8%), and reducing taxes and fees (7%). No other improvement was mentioned by at least 5% of respondents.

Question 3: Business Survey *If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see?*

FIGURE 9 CHANGES TO IMPROVE BUSINESS CLIMATE

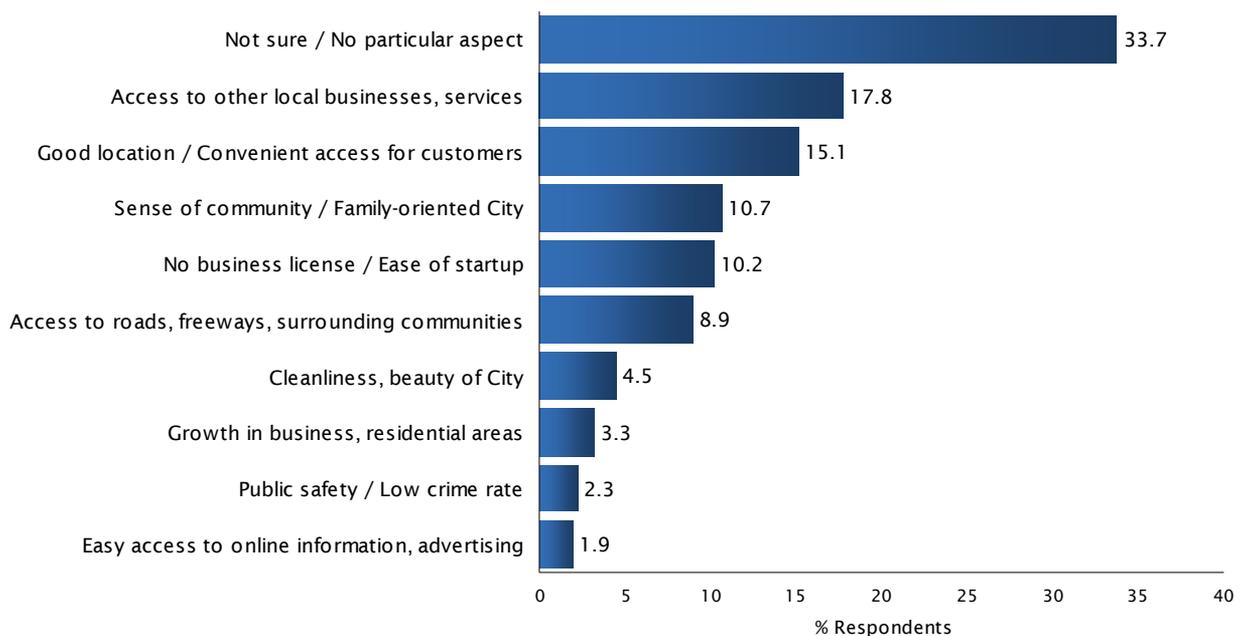


ASPECTS OF LAKE FOREST MOST BENEFICIAL TO BUSINESS All businesses were next asked if there was a particular aspect or feature of Lake Forest that is beneficial to their business. This question was also posed in an open-ended manner, allowing respondents to mention any aspect without being prompted by or limited to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 10.

The most common response from business managers was that there were no particular features of Lake Forest that benefit their business, or that they could not think of any at the time of the interview (34%). Among specific aspects mentioned, access to other local businesses and services (18%), having a convenient, easily-accessible location within the City (15%), Lake Forest’s sense of community (11%), the minimal expense and ease of starting a business in Lake Forest (10%), and proximity to local freeways and surrounding areas of interest (9%), were mentioned most often.

Question 4: Business Survey *is there a particular aspect or feature of Lake Forest that is beneficial to your business?*

FIGURE 10 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS

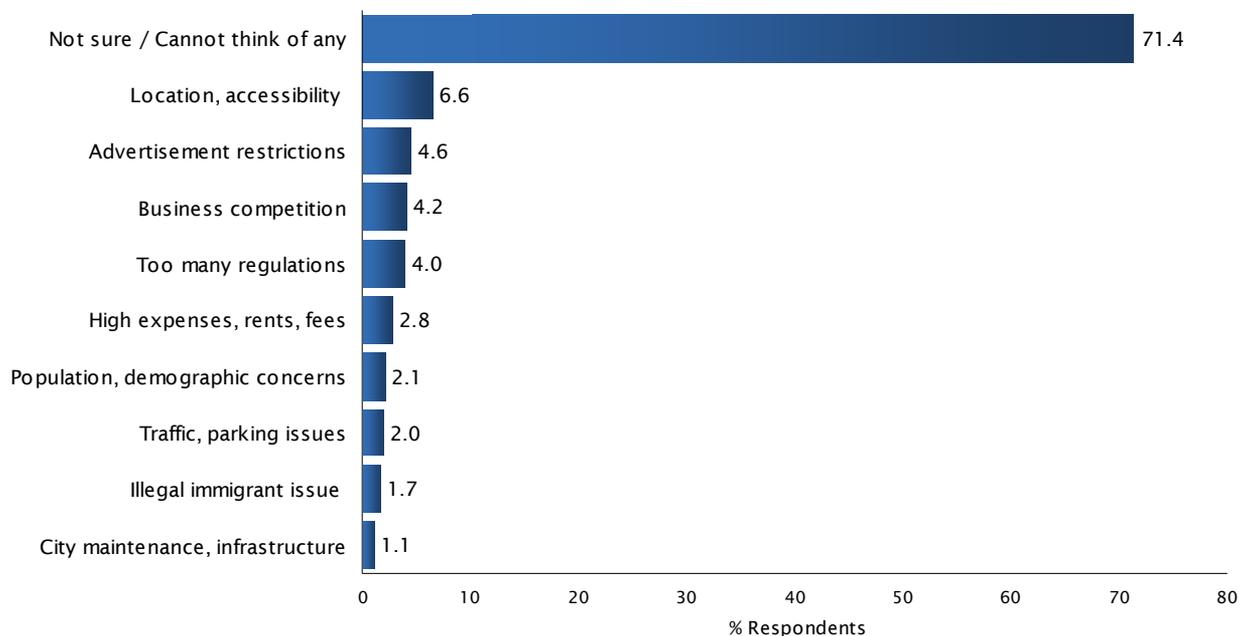


CHALLENGES OF DOING BUSINESS IN LAKE FOREST New to the 2014 survey, all business managers were asked in an open-ended manner if there were any particular challenges associated with doing business in Lake Forest. Verbatim responses were recorded and later grouped into the categories shown in Figure 11.

Seven-in-ten (71% of) business managers surveyed said they could not think of any challenges associated with doing business in Lake Forest. Those most common specific challenges cited were the location of the business and accessibility to freeways and surrounding communities (7%), advertisement and signage restrictions (5%), local business competition (4%), and general concerns about local regulations and restrictions (4%).

Question 5: Business Survey *Are there any particular challenges associated with doing business in Lake Forest?*

FIGURE 11 CHALLENGES WITH DOING BUSINESS IN LAKE FOREST



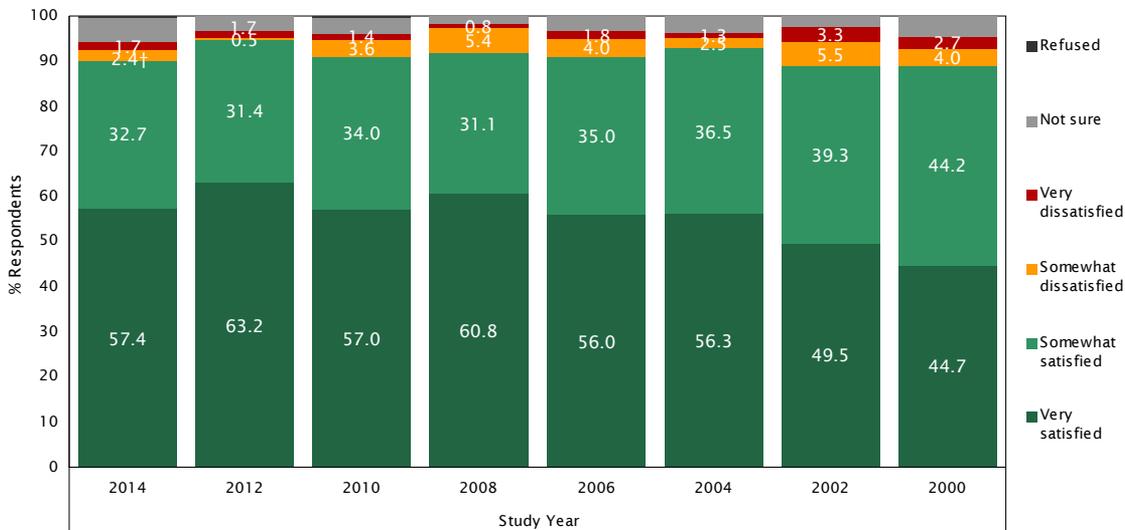
OVERALL PERFORMANCE RATING Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service, and requested that the respondent consider the City’s performance in general, the findings of this question may be regarded as an *overall performance rating* for the City.

Figure 12 on the next page presents the results of this question for the resident survey for 2014 and for prior surveys dating back to 2000, whereas Figure 15 presents the corresponding results for the business survey. In both cases, the overwhelming majority of respondents indicated that they were satisfied with the City of Lake Forest’s efforts to provide municipal services. Specifically, 90% of residents and 87% of local businesses in 2014 indicated that they were satisfied in this respect.

The general trend of opinion since 2000 has been positive, although when compared with 2012, among residents there was a small but statistically significant increase in the percentage who were somewhat dissatisfied (+2%) in 2014. Among business respondents there were no statistically significant changes in satisfaction from 2012.

Question 4: Resident Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 12 OVERALL SATISFACTION: RESIDENT SURVEY (2014 ~ 2000)



† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

Figures 13 and 14 below display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 16 and 17 present similar information for the business community. Overall satisfaction was consistently high across all subgroups with approximately 9 out of 10 residents and 8 out of 10 business managers surveyed indicating they were very or somewhat satisfied.

FIGURE 13 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER

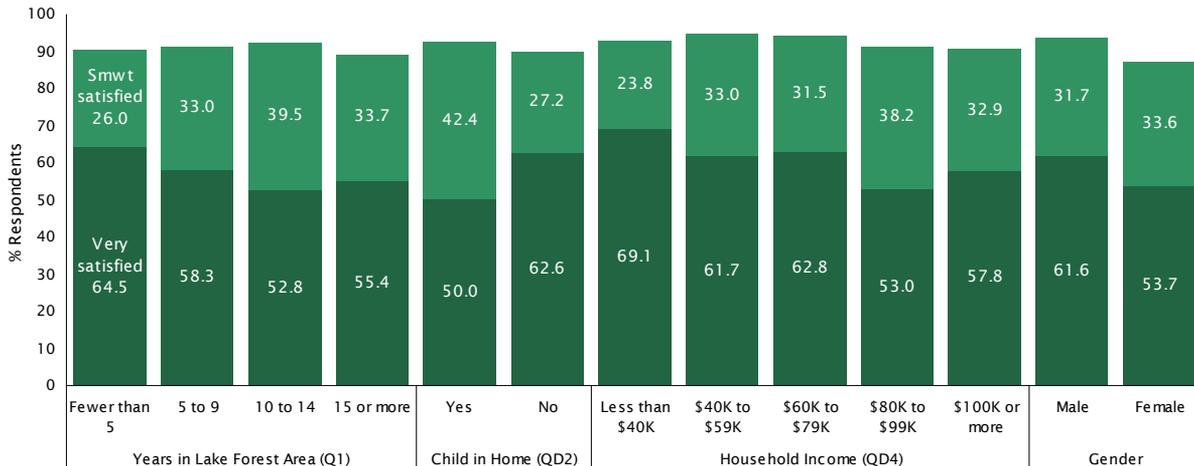
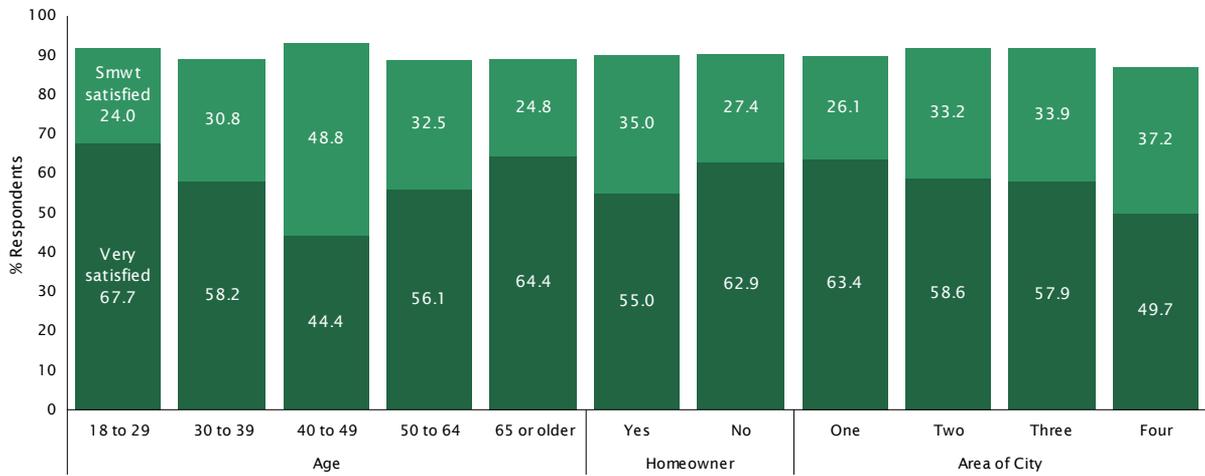


FIGURE 14 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOMEOWNER & AREA OF CITY



Question 6: Business Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 15 OVERALL SATISFACTION: BUSINESS SURVEY (2014 ~ 2000)

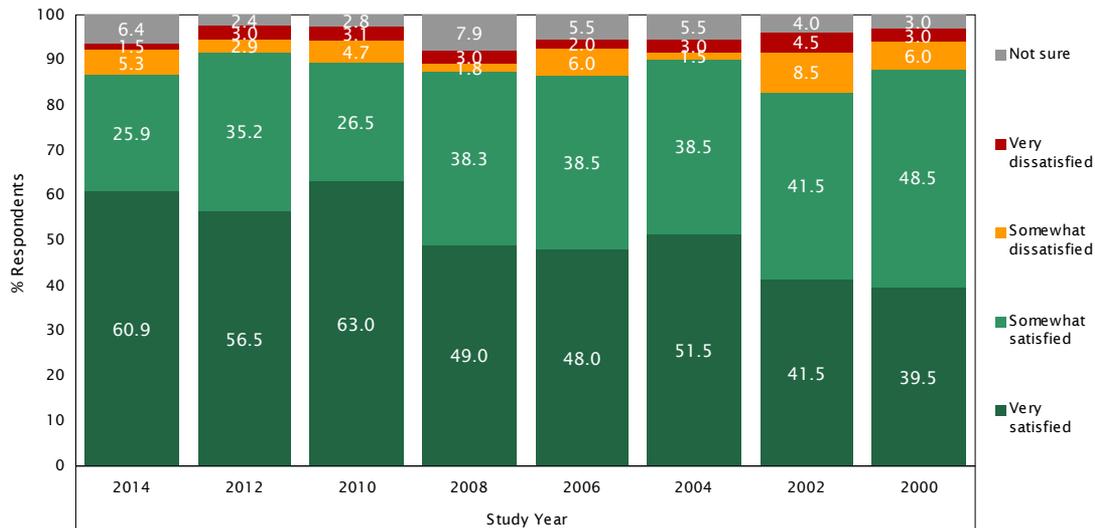


FIGURE 16 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY

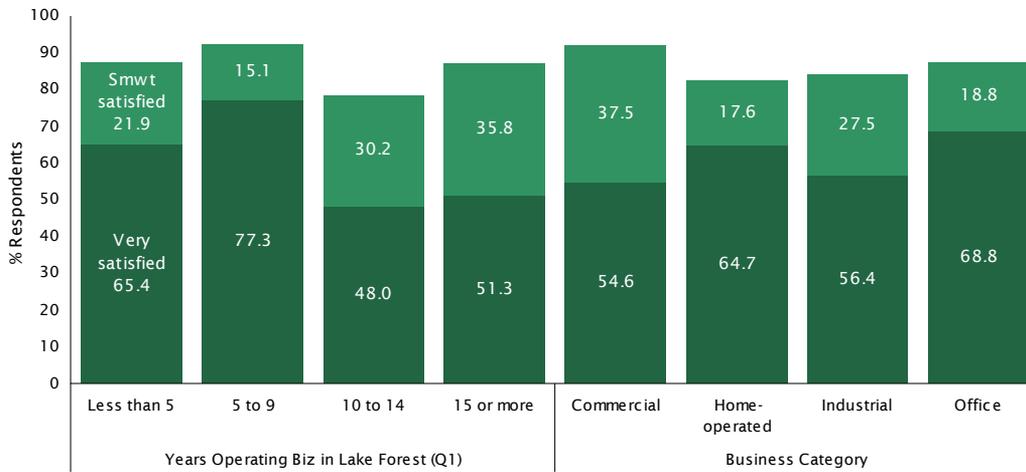
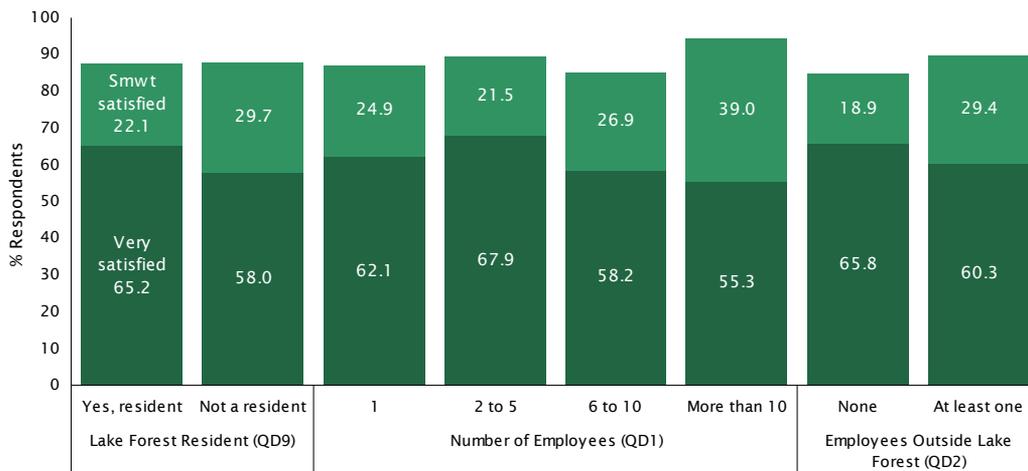


FIGURE 17 OVERALL SATISFACTION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES OUTSIDE LAKE FOREST



SPECIFIC SERVICES: RESIDENT SURVEY

Whereas Question 4 of the resident survey addressed the City of Lake Forest’s *overall* performance, the next series of questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents were asked if they thought a service was extremely important, very important, somewhat important, or not at all important. Respondents were then asked about their satisfaction with these same services. To minimize respondent fatigue that can occur with lengthy lists in a survey, the services were divided by department. Within department lists, the order of the items was randomized to avoid a systematic position bias. Because the list of services presented to residents was somewhat different than that presented to businesses, the results are displayed separately for the two groups. This section of the report presents the results for the resident survey; results for the business survey are discussed in the next section.

POLICE SERVICES Figure 18 presents the services provided by the Police Department sorted in order of importance according to the percentage of respondents who rated a service as *at least* very important. Overall, residents rated maintaining a low crime rate as the most important service (91% extremely or very important), followed by investigating criminal activity (89%) and preparing for emergencies (78%). At the other end of the spectrum, providing animal control services (50%) and providing neighborhood watch programs (58%) were viewed as less important. Table 1 on the next page displays the percentage of respondents who viewed each service as extremely or very important for 2014 and 2012, as well as the difference between the two studies. Despite minor fluctuations, there were no statistically significant differences.

Question 5: Resident Survey *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.*

FIGURE 18 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

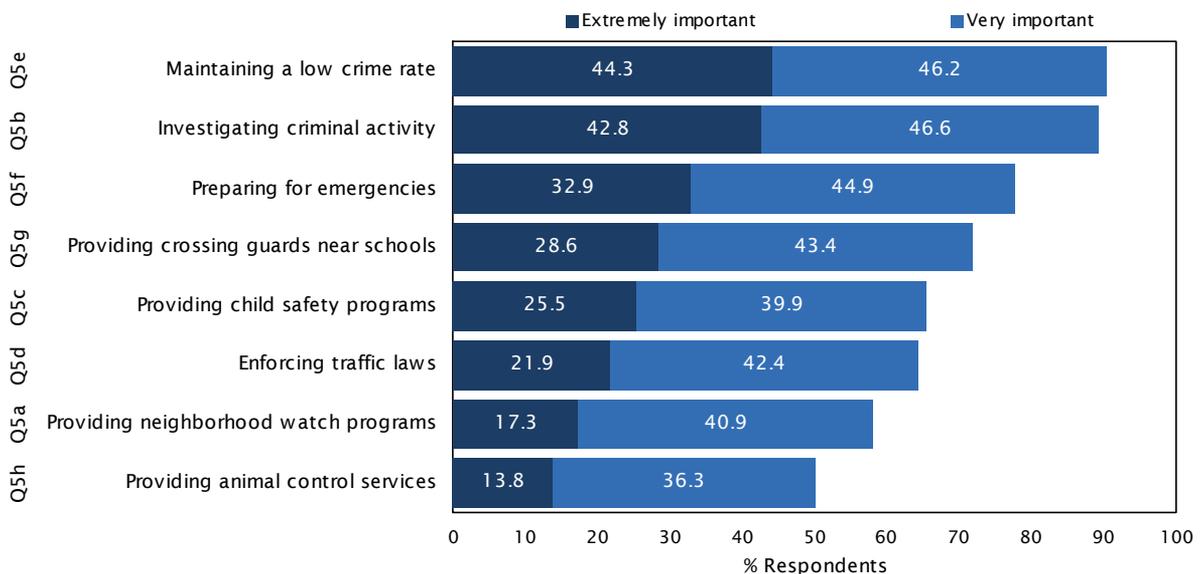


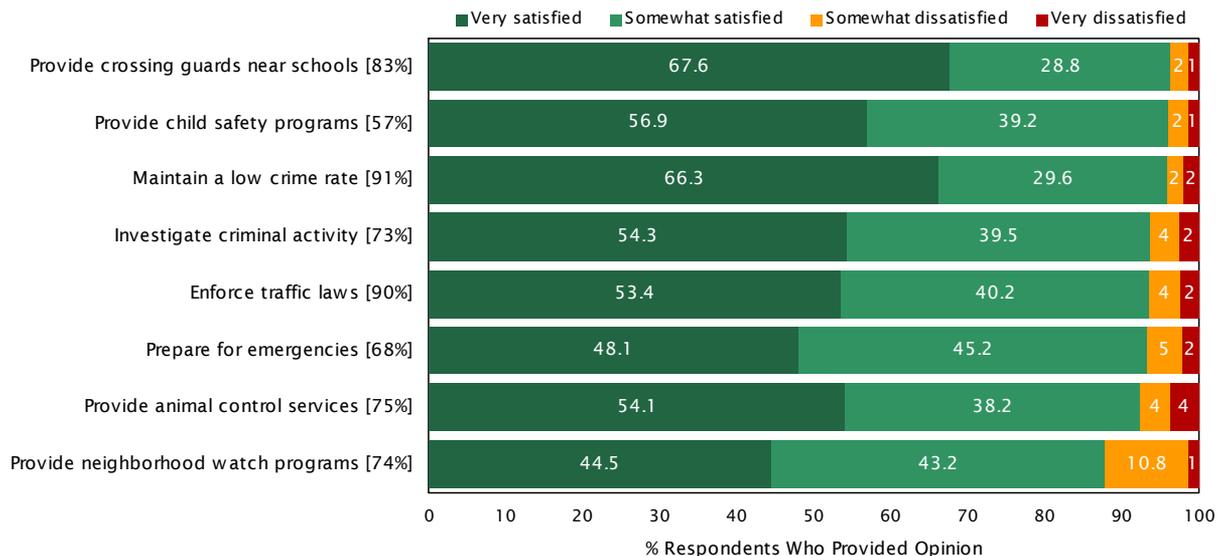
TABLE 1 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Providing animal control services	50.1	44.5	+5.6
Providing crossing guards near schools	72.0	69.3	+2.6
Providing neighborhood watch programs	58.2	58.6	-0.4
Investigating criminal activity	89.4	92.6	-3.2
Enforcing traffic laws	64.3	67.8	-3.5
Maintaining a low crime rate	90.5	95.2	-4.7
Providing child safety programs	65.4	70.2	-4.8
Preparing for emergencies	77.8	83.5	-5.7

Turning to the satisfaction component, Figure 19 sorts the same list of services according to the percentage of respondents who said they were either very or somewhat satisfied with the City’s efforts to provide the service. To allow for an apples-to-apples comparison of the satisfaction ratings, only respondents who provided an opinion (either satisfied or dissatisfied) are included in Figure 19—those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in brackets. Thus, for example, among the 83% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 68% were very satisfied and 29% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

Question 6: Resident Survey *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 19 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY¹



1. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in brackets. Thus, for example, among the 83% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 68% were very satisfied and 29% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

Satisfaction was high for all police services tested. Overall, respondents were most satisfied with the Department’s efforts to provide crossing guards near schools (96% very or somewhat satisfied), provide child safety programs (96%), and maintain a low crime rate (96%). Table 2 below shows how the 2014 results compare with the prior 2012 study. Overall satisfaction with police service was strikingly similar between the two studies, and there were no statistically significant changes.

TABLE 2 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Investigate criminal activity	93.8	92.4	+1.4
Provide child safety programs	96.1	95.2	+0.8
Maintain a low crime rate	95.9	95.5	+0.5
Enforce traffic laws	93.6	93.2	+0.4
Prepare for emergencies	93.3	93.2	+0.2
Provide animal control services	92.3	92.8	-0.5
Provide crossing guards near schools	96.4	97.2	-0.8
Provide neighborhood watch programs	87.8	89.2	-1.4

DEVELOPMENT SERVICES DEPARTMENT Figure 20 presents the services provided by the Development Services Department sorted by order of importance according to the percentage of residents who rated a service as *at least* very important. Overall, residents rated inspecting buildings as the most important service provided by the Department (56%), followed by enforcing zoning regulations (53%), issuing building permits (49%), and enforcing sign regulations (48%). When compared with 2012, there were no statistically significant changes in the perceived importance of these four services (see Table 3 on the next page).

Question 7: Resident Survey *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.*

FIGURE 20 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

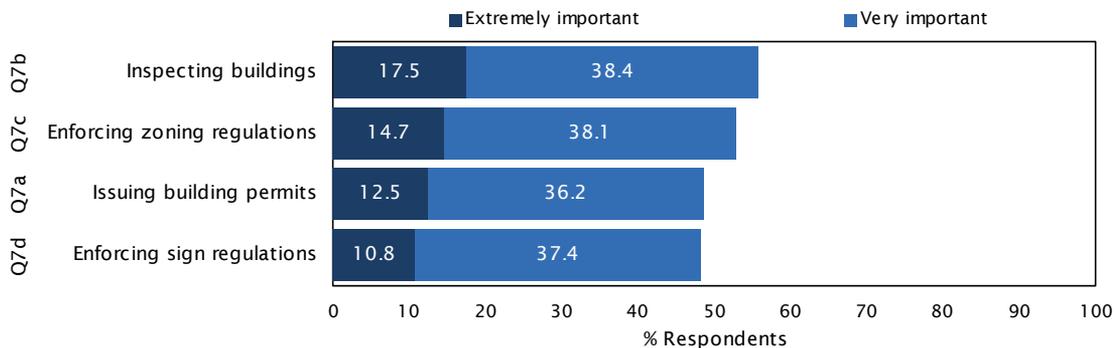


TABLE 3 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Enforcing sign regulations	48.3	42.3	+6.0
Enforcing zoning regulations	52.8	52.1	+0.6
Issuing building permits	48.7	50.7	-2.0
Inspecting buildings	55.9	58.8	-2.9

Figure 21 presents residents' satisfaction with the same list of services provided by the Development Services Department. Satisfaction ratings assigned to the four development services ranged from a low of 87% for enforcing zoning regulations to a high of 92% for inspecting buildings. Despite minor fluctuations in responses, there were no statistically significant changes between the 2012 and 2014 studies (see Table 4). Satisfaction was generally lower among residents who reported that they had personally used services offered by the Department in the past year (see Table 5), although it is important to note that with only 38 respondents in the survey reporting that they had interacted with the Department, the margin of error associated with this subgroup is considerably large and the findings are not necessarily representative of the Department's customers as a whole.

Question 8: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?*

FIGURE 21 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

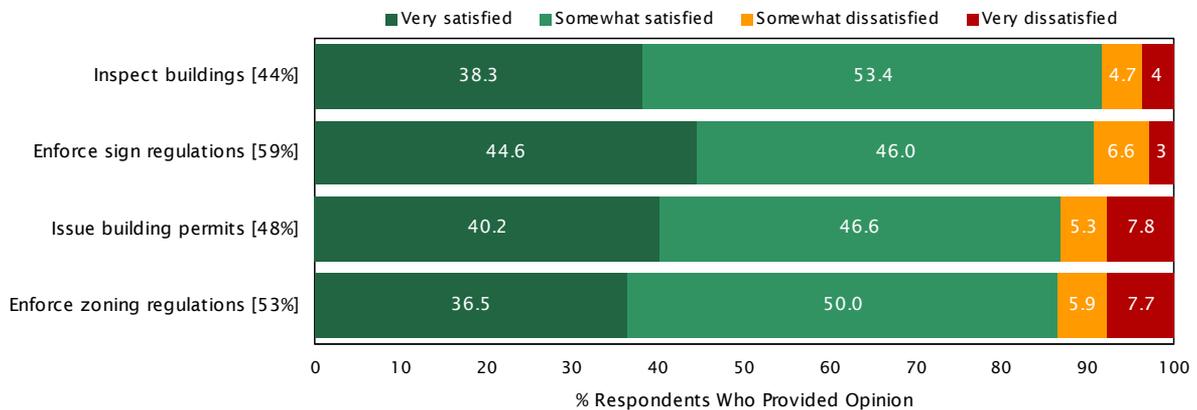


TABLE 4 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Enforce sign regulations	90.6	91.7	-1.1
Inspect buildings	91.6	93.5	-1.8
Enforce zoning regulations	86.4	90.3	-3.9
Issue building permits	86.8	91.7	-4.9

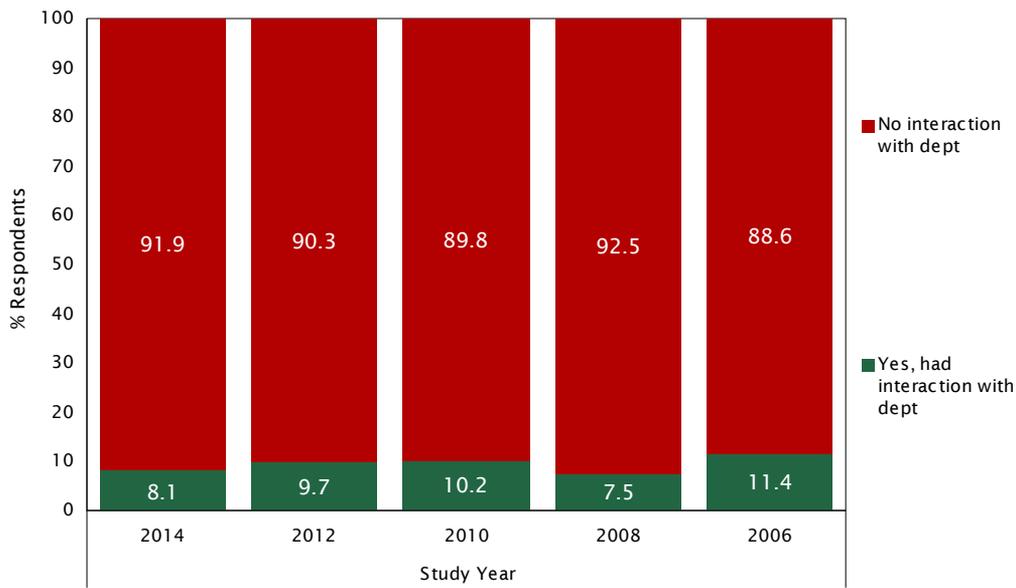
TABLE 5 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR

	Interacted With Development Services Department in Past Year		Difference in Satisfaction
	Yes	No	
Enforce zoning regulations	83.6	87.2	-3.5
Issue building permits	82.4	87.4	-5.0
Enforce sign regulations	84.8	91.1	-6.3
Inspect buildings	80.8	93.2	-12.4

Whereas most departments in the City that directly serve the public primarily interact with residents, customers of the Development Services Department are, for the most part, businesses. One question of interest to the study was whether a respondent had interacted with the Development Services Department during the past year. As shown in Figure 22, just 8% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2014, which is virtually identical to the percentage recorded in 2012, and in line with the previous three studies.

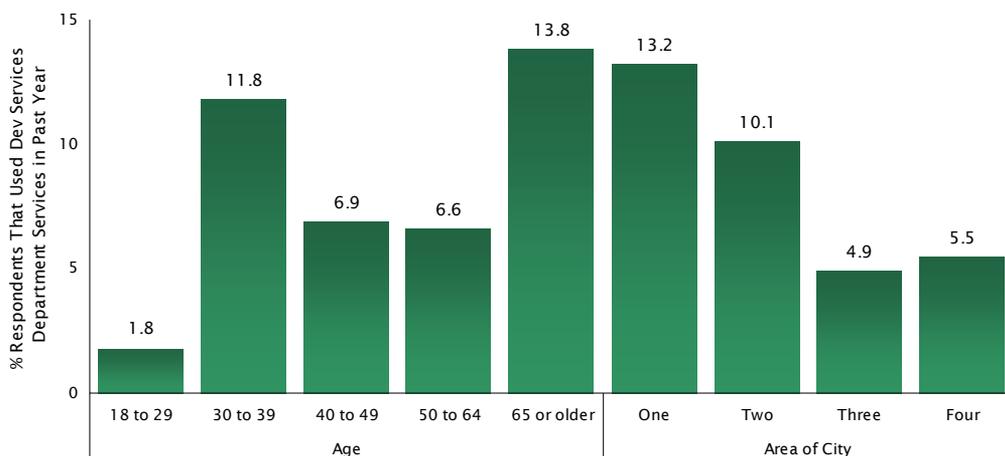
Question 9: Resident Survey *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

FIGURE 22 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY (2014 ~ 2006)



When compared with their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by seniors and those who reside in Area One or Area Two (see Figure 23).

FIGURE 23 INTERACTED WITH DEVELOPMENT SERVICES IN PAST YEAR: RESIDENT SURVEY BY AGE & AREA OF CITY



PUBLIC WORKS DEPARTMENT The next figure presents the importance that residents assigned to ten services provided by the Public Works Department, sorted in order of importance. Overall, maintaining local streets and roads was viewed as the most important service (89%), followed by providing garbage collection services (88%) and reducing traffic congestion (82%). Although there were some changes in the perceived importance of Public Works services between 2012 and 2014, the differences were not statistically significant (see Table 6).

Question 10: Resident Survey Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important.

FIGURE 24 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

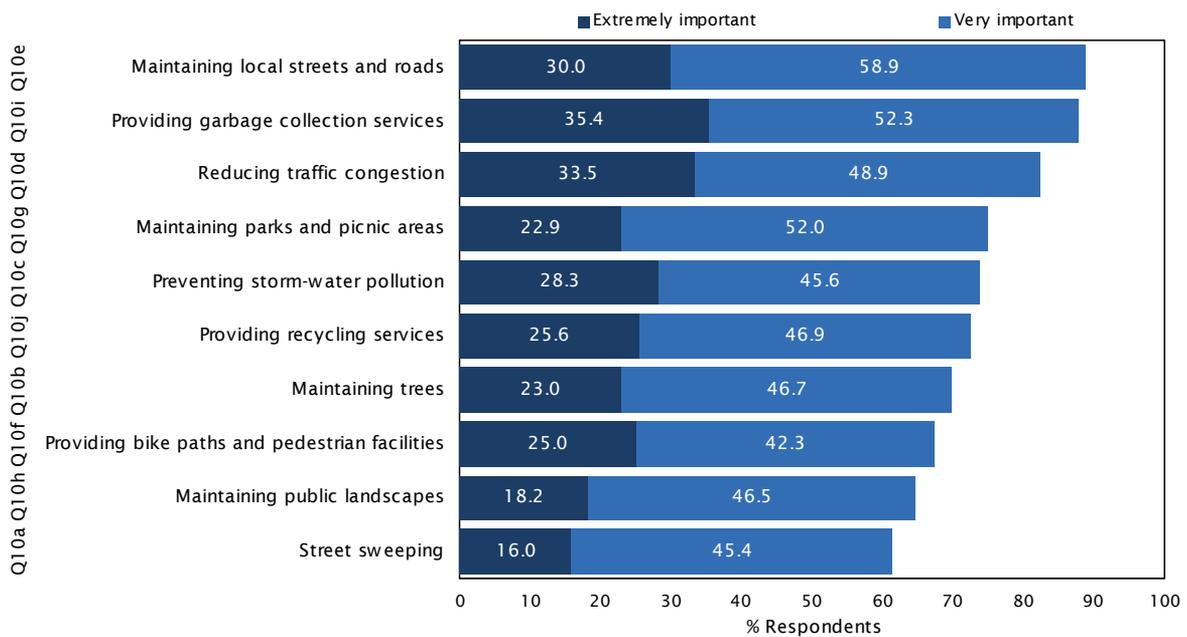


TABLE 6 IMPORTANCE OF PUBLIC WOKS SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Street sweeping	61.4	58.9	+2.5
Providing recycling services	72.6	71.4	+1.1
Maintaining local streets and roads	88.9	89.2	-0.2
Maintaining trees	69.7	70.7	-1.0
Providing bike paths and pedestrian facilities	67.3	68.6	-1.2
Reducing traffic congestion	82.4	83.9	-1.5
Providing garbage collection services	87.7	90.2	-2.5
Maintaining public landscapes	64.7	67.8	-3.1
Maintaining parks and picnic areas	74.9	79.9	-4.9
Preventing storm-water pollution	73.8	79.0	-5.1

Figure 25 on the next page presents the levels of satisfaction with the same list of ten services provided by the Public Works Department. Residents were most satisfied with the Department's efforts to maintain parks and picnic areas (97%), provide street sweeping services (96%), maintain public landscapes (96%), provide garbage collection services (96%), and maintain trees (95%). As shown in Table 7 below, when compared with 2012, there was a statistically significant decrease in satisfaction with efforts to reduce traffic congestion (-10%).

Question 11: Resident Survey Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?

FIGURE 25 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

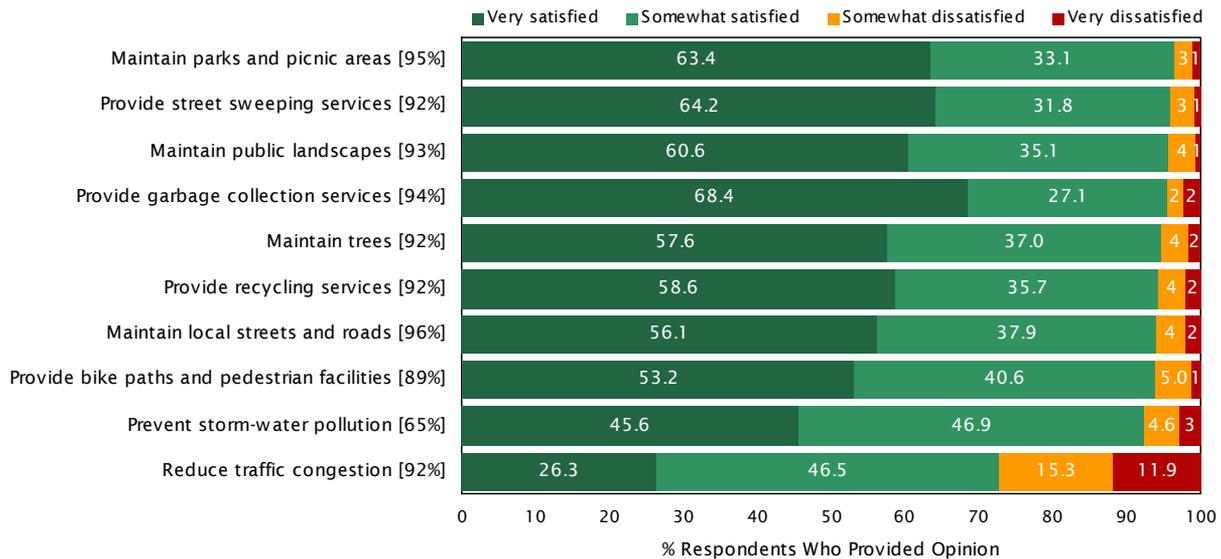


TABLE 7 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Maintain trees	94.6	91.9	+2.7
Provide recycling services	94.3	91.9	+2.4
Maintain local streets and roads	94.0	92.3	+1.7
Provide street sweeping services	96.0	94.4	+1.5
Maintain public landscapes	95.7	95.3	+0.4
Maintain parks and picnic areas	96.5	96.5	-0.0
Provide bike paths and pedestrian facilities	93.9	96.1	-2.2
Provide garbage collection services	95.5	98.2	-2.7
Prevent storm-water pollution	92.4	96.3	-3.8
Reduce traffic congestion	72.9	83.2	-10.3†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

COMMUNITY SERVICES DEPARTMENT In a format identical to that used in questions 5, 7, and 10, Question 12 asked residents to indicate the level of importance they associated with services provided by the Community Services Department. Figure 26 on the next page presents each of the services tested, sorted by order of importance. Residents assigned the highest importance to providing recreation programs for special needs children (72%), followed by providing recreation and sports programs for teens (66%), providing recreation and sports programs for elementary school-aged children (64%), and providing special events like concerts in the park and the Fourth of July Parade (62%). Providing adult sports programs (38%) and adult recreation programs (48%) were viewed as less important, although as shown in Table 8, both saw significant increases in importance from the 2012 study (+7% and +10%). There was also a statistically significant decrease in the importance assigned to providing after school recreation programs (-13%).

Question 12: Resident Survey Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.

FIGURE 26 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY

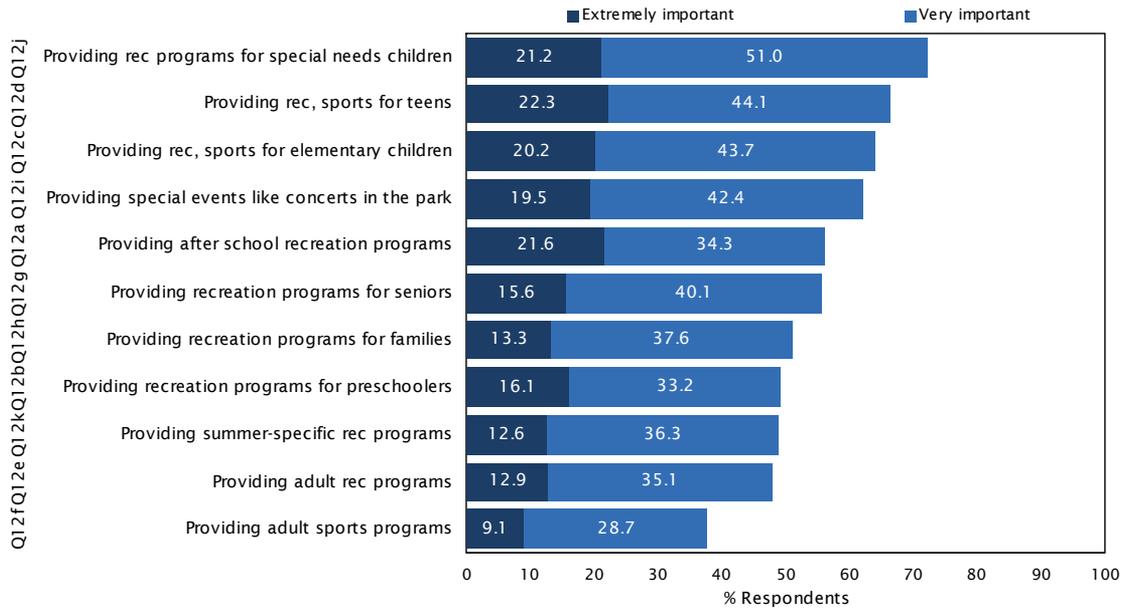


TABLE 8 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Providing adult rec programs	48.0	38.2	+9.8†
Providing adult sports programs	37.7	30.6	+7.2†
Providing special events like concerts in the park	61.9	57.4	+4.6
Providing recreation programs for seniors	55.7	53.4	+2.2
Providing recreation programs for families	50.9	49.1	+1.8
Providing rec programs for special needs children	72.2	71.9	+0.3
Providing rec, sports for teens	66.4	66.2	+0.2
Providing summer-specific rec programs	48.9	52.1	-3.3
Providing rec, sports for elementary children	63.9	67.6	-3.7
Providing recreation programs for preschoolers	49.3	54.2	-4.9
Providing after school recreation programs	56.0	69.3	-13.4†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

When asked about their satisfaction with the same list of services (Figure 27 on the next page), most residents who held an opinion indicated that they were quite satisfied with every service tested, similar to the patterns found in other departments. Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (92%), special events like concerts in the park and the Fourth of July Parade (92%), and recreation and sports programs for teens (92%). Residents were somewhat less satisfied with the Department's efforts to provide recreation programs for special needs children (83%). When compared with the results from 2012, there was a statistically significant decrease in satisfaction with the City's efforts to provide summer-specific recreation programs such as camps (see Table 9).

Question 13: Resident Survey Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?

FIGURE 27 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY

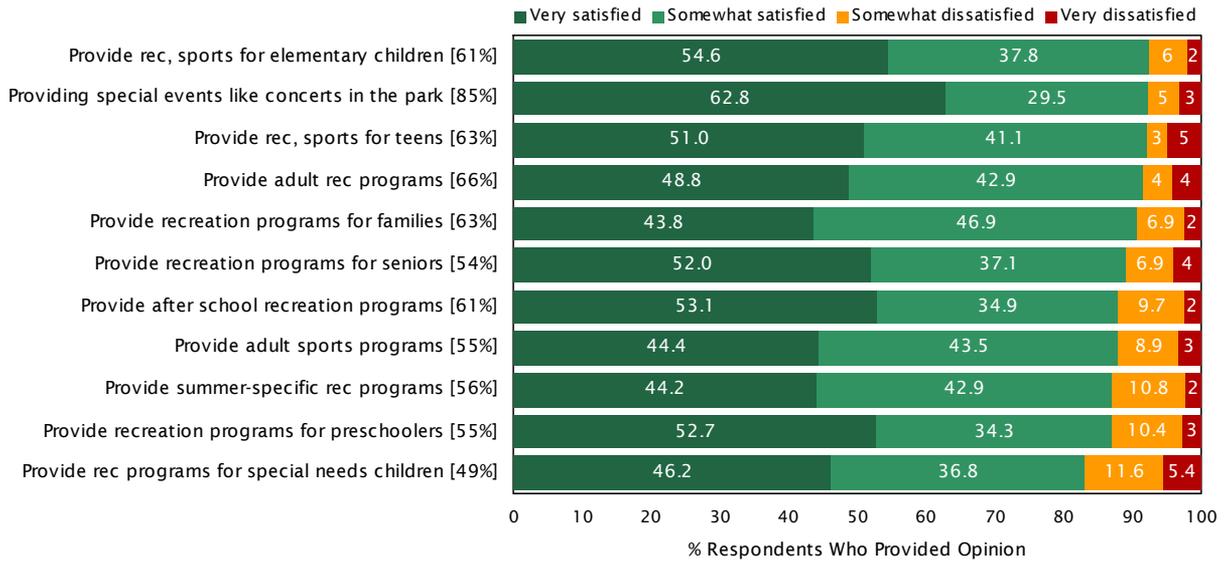


TABLE 9 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Provide rec, sports for teens	92.0	89.6	+2.4
Provide adult rec programs	91.6	90.0	+1.7
Provide adult sports programs	87.8	86.6	+1.2
Provide rec, sports for elementary children	92.4	92.1	+0.3
Provide recreation programs for families	90.7	91.6	-0.9
Providing special events like concerts in the park	92.3	95.2	-2.9
Provide rec programs for special needs children	83.0	86.4	-3.4
Provide after school recreation programs	88.0	92.0	-4.0
Provide recreation programs for preschoolers	87.0	91.2	-4.2
Provide recreation programs for seniors	89.1	93.9	-4.8
Provide summer-specific rec programs	87.1	93.1	-6.0†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

SPECIFIC SERVICES: BUSINESS SURVEY

Participants in the business survey were also asked to rate the importance of specific services offered by the City of Lake Forest, as well as indicate their level of satisfaction with the City’s current efforts to provide each service. Although some services appear in both the resident and business surveys (e.g., maintaining a low crime rate) the list of services tested with the business community was appropriately tailored to the audience and included services not tested with residents, such as providing business networking events and business consulting services. Because the list of services tested with the business community was considerably shorter than that used in the resident survey, the following figures present the results for services that span several departments.

Figure 28 provides the importance ratings assigned to each of the services tested in the first list, which can be loosely categorized as *general City services*. Overall, the business community rated maintaining a low crime rate as the most important of the services tested (93% extremely or very important), followed by investigating criminal activity (86%). Promoting economic development (68%) and revitalizing outdated areas in the City (67%) were next in the list, although somewhat less important overall. The business community viewed providing free business consulting services (34%), business education events (36%), and business watch programs (37%) as the least important of the general services tested. As shown in Table 10 on the next page, the perceived importance of promoting economic development decreased significantly from 2012 (-9%).

Question 7: Business Survey *Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.*

FIGURE 28 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY

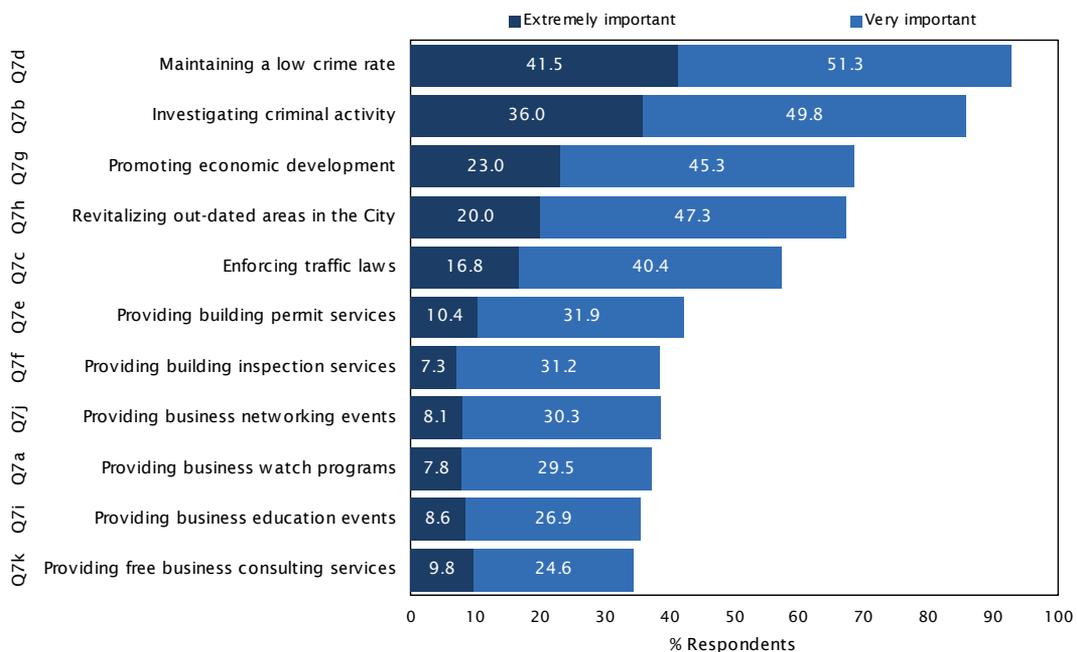


TABLE 10 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Revitalizing out-dated areas in the City	67.3	65.6	+1.7
Providing free business consulting services	34.4	33.7	+0.6
Providing business education events	35.5	35.6	-0.1
Investigating criminal activity	85.8	87.3	-1.5
Maintaining a low crime rate	92.8	95.8	-3.1
Providing building inspection services	38.5	41.7	-3.2
Providing business networking events	38.5	42.0	-3.5
Enforcing traffic laws	57.2	60.9	-3.7
Providing building permit services	42.3	46.5	-4.2
Providing business watch programs	37.3	43.6	-6.3
Promoting economic development	68.4	77.3	-8.9†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

When asked about their satisfaction with the same list of services, the business community indicated that they were quite satisfied with every service tested (see Figure 29). At the top of the list was maintaining a low crime rate (95%), followed by providing building inspection services (95%), investigating criminal activity (95%), and providing business education events (94%). Businesses were just slightly less satisfied with the City’s efforts to revitalize outdated areas in the City (91%) and enforce traffic laws (91%). There were no statistically significant changes in satisfaction between 2012 and 2014 (see Table 11 on the next page).

Question 8: Business Survey *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 29 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY

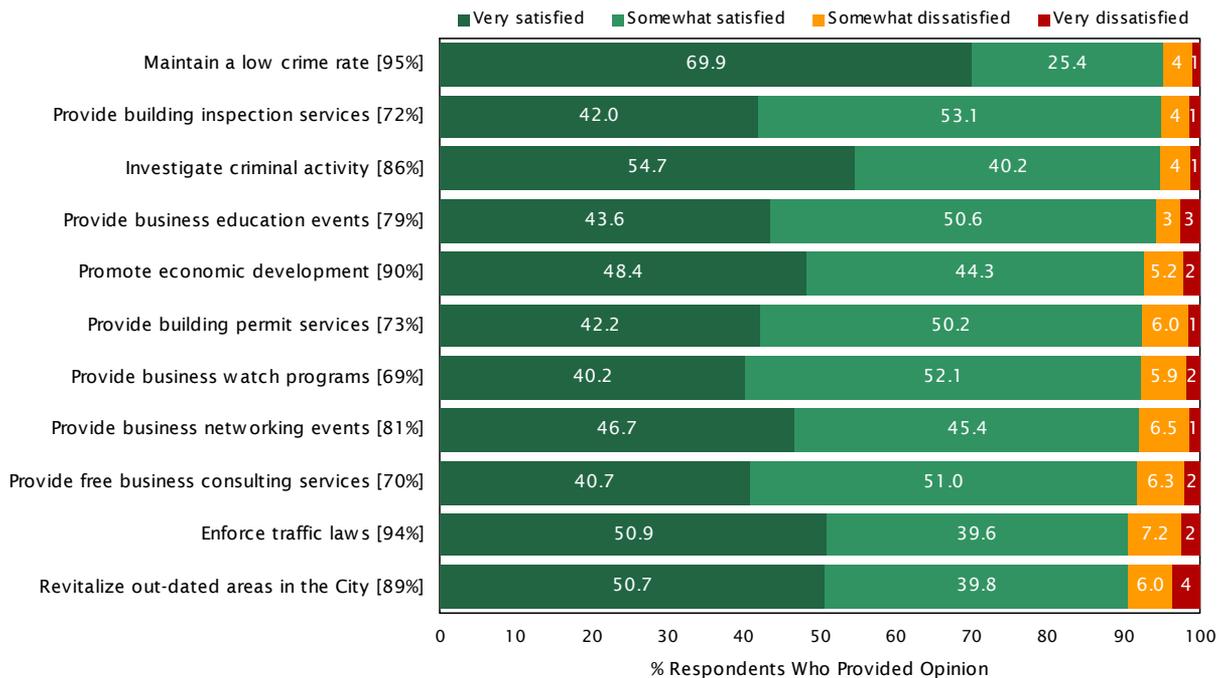


TABLE 11 SATISFACTION WITH SELECT SERVICES I: BUSINESS SERVICES (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Promote economic development	92.6	89.9	+2.8
Provide business education events	94.2	92.4	+1.8
Provide business networking events	92.1	90.9	+1.2
Provide building inspection services	95.1	94.1	+1.0
Provide business watch programs	92.3	92.2	+0.1
Investigate criminal activity	94.9	95.1	-0.3
Provide building permit services	92.5	92.7	-0.3
Provide free business consulting services	91.7	92.1	-0.5
Maintain a low crime rate	95.3	96.5	-1.2
Enforce traffic laws	90.6	93.0	-2.5
Revitalize out-dated areas in the City	90.5	94.6	-4.1

The second list of services presented to business managers, shown in Figure 30, relates mostly to maintaining and improving the City’s infrastructure. When asked to rate the importance they assign to each of these services, members of the business community rated maintaining local streets and roads as most important (80%), followed closely by reducing traffic congestion (77%). The other four services, street sweeping (52%), enforcing zoning regulations (49%), enforcing sign regulations (49%), and landscaping median strips and other areas of the City (48%) were viewed as somewhat less important. As shown in Table 12 on the next page, compared with 2012, there was a significant decrease in the perceived importance of landscaping median strips and other areas of the City (-15%) and maintaining local streets and roads (-10%).

Question 9: Business Survey *Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.*

FIGURE 30 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

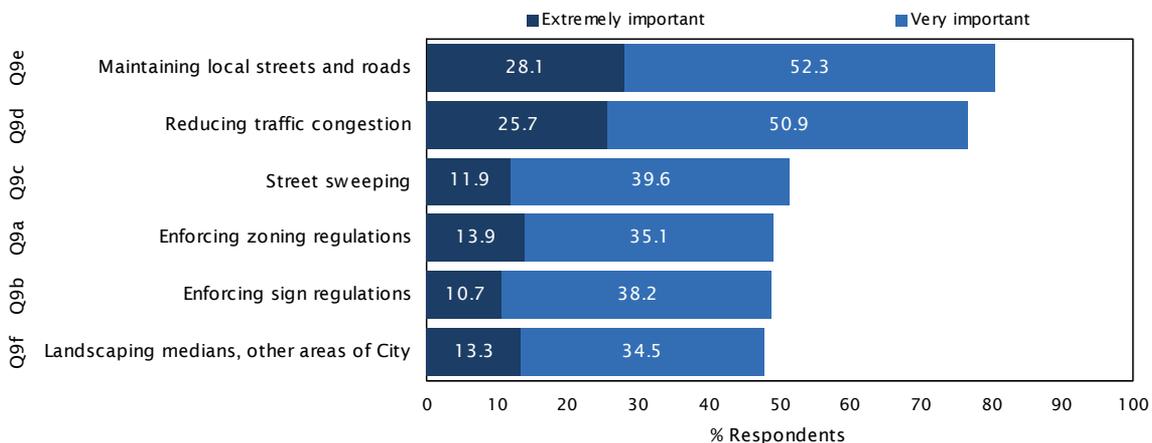


TABLE 12 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2014 ~ 2012)

	Study Year		Change in Extremely + Very Important
	2014	2012	
Enforcing zoning regulations	49.0	46.5	+2.5
Enforcing sign regulations	48.9	50.9	-2.1
Reducing traffic congestion	76.6	80.1	-3.5
Street sweeping	51.5	60.9	-9.4
Maintaining local streets and roads	80.4	90.0	-9.5†
Landscaping medians, other areas of City	47.8	63.1	-15.4†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

Figure 31 presents the overall levels of satisfaction for the same list of infrastructure services tested in the previous question. Satisfaction was greatest with respect to the City’s efforts to provide street sweeping services (98%), enforce zoning regulations (95%), landscape median strips and other areas of the City (95%), and maintain local streets and roads (95%). The business community was generally less satisfied with efforts to reduce traffic congestion (77%) and enforce sign regulations (87%). As shown in Table 13, between 2012 and 2014 there was a statistically significant decrease in satisfaction with efforts to reduce traffic congestion (-9%).

Question 10: Business Survey *Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 31 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY

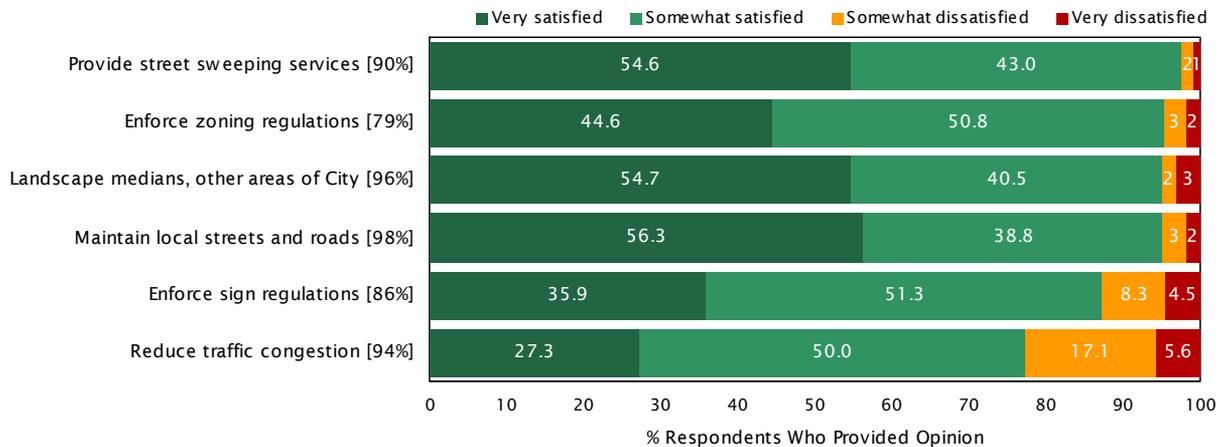


TABLE 13 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2014 ~ 2012)

	Study Year		Change in Satisfaction
	2014	2012	
Enforce zoning regulations	95.4	93.2	+2.2
Provide street sweeping services	97.6	96.8	+0.7
Enforce sign regulations	87.2	88.6	-1.4
Maintain local streets and roads	95.1	97.5	-2.4
Landscape medians, other areas of City	95.2	98.0	-2.9
Reduce traffic congestion	77.3	85.9	-8.6†

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.



PERFORMANCE NEEDS & PRIORITIES

With a measure of the importance of a service to respondents as well as a measure of respondents' satisfaction with the City's efforts to provide the service, True North is able to examine the relationship between these two dimensions and identify service areas where the City has the greatest opportunities to improve overall satisfaction—as well as identify for which services the City is meeting, and even exceeding, the vast majority of residents' and businesses' needs.

Rather than rely on sample *averages* to conduct this analysis, True North has developed and refined an *individualized* approach to identifying priorities. This approach is built on the recognition that opinions will vary from resident to resident (and business to business) and that understanding this *variation* is required for assessing how well the City is meeting the needs of its constituents.² Table 14 on the next page presents a two-dimensional grid based on the importance and satisfaction scales. The horizontal axis corresponds to the four *importance* response options, whereas the vertical scale corresponds to the four *satisfaction* response options.

The 16 cells within the grid are grouped into one of six categories based on how well the City is meeting, or not meeting, a resident's needs for a particular service. The six groups are as follows:

<i>Exceeding Needs</i>	The City is exceeding a respondent's needs if a respondent is satisfied and the level of expressed satisfaction is higher than the importance the respondent assigned to the service.
<i>Meeting Needs, Moderately</i>	The City is moderately meeting a respondent's needs if the respondent is satisfied and the level of satisfaction is commensurate with the level of importance assigned to the service.
<i>Meeting Needs, Marginally</i>	The City is marginally meeting a respondent's needs if the respondent is satisfied with the City's efforts to provide the service, but their level of satisfaction is lower than the level of importance assigned to the service.
<i>Not Meeting Needs, Marginally</i>	The City is marginally <i>not</i> meeting a respondent's needs if the respondent is somewhat dissatisfied, but the service is also viewed as just somewhat or not at all important.
<i>Not Meeting Needs, Moderately</i>	The City is moderately <i>not</i> meeting a respondent's needs if a) a respondent is very dissatisfied with the City's efforts to provide the service, but the service is viewed just somewhat or not at all important, or b) a respondent is somewhat dissatisfied and the service is viewed as very important.

2. Any tool that relies solely on the opinions of the average respondent will provide a limited and occasionally distorted picture of how well an agency is performing. The simple fact is that a City is not comprised of *average* residents or business managers—it is comprised of unique individuals who vary in their opinions of the City's performance in different service areas. Thus, although the arithmetic average of these individuals' opinions is a useful statistic, it does not capture the variation in opinions that occurs among residents, and it is this variation that is critical for truly assessing how well the City is meeting the needs of its constituents.

Not Meeting Needs, Severely

The City is severely *not* meeting a respondent’s needs if a) a respondent is dissatisfied and the service is viewed as extremely important, or b) a respondent is very dissatisfied and the service is viewed as very important.

TABLE 14 NEEDS & PRIORITY MATRIX

		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
	Somewhat dissatisfied	Not meeting needs, marginally	Not meeting needs, marginally	Not meeting needs, moderately	Not meeting needs, severely
	Very dissatisfied	Not meeting needs, moderately	Not meeting needs, moderately	Not meeting needs, severely	Not meeting needs, severely

Using this framework, True North categorized each respondent individually for each of the services tested in the study. Thus, for example, a respondent who indicated that reducing traffic congestion was somewhat important and they were very satisfied with the City’s efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service—e.g., maintaining local streets and roads—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

Figure 32 presents each of the 33 services tested with residents, along with the percentage grouped into each of the six possible categories. Figure 33 provides the same information for the 17 services tested with the business community. For ease of interpretation, the color-coding in both figures is consistent with that presented in Table 14 above. Thus, for example, in the service area of reducing traffic congestion on City streets, the City is exceeding the needs of 5% of residents, moderately meeting the needs of 28% of residents, marginally meeting the needs of 40% of residents, marginally not meeting the needs of 3% of residents, moderately not meeting the needs of 8% of residents, and severely not meeting the needs of 16% of residents.

Operating from the management philosophy that, all other things being equal, the City should focus on improving those services that have the highest percentage of residents and businesses for which the City is currently *not* meeting their needs, the services have been sorted in order of priority in figures 32 and 33. For the majority of services tested, the City is meeting the needs of at least 90% of residents and businesses. In fact, for all but one service—reducing traffic congestion—the City is meeting the needs of at least 80% of residents. For both residents and businesses, reducing traffic congestion is the top priority.

FIGURE 32 SERVICE NEEDS: RESIDENT SURVEY

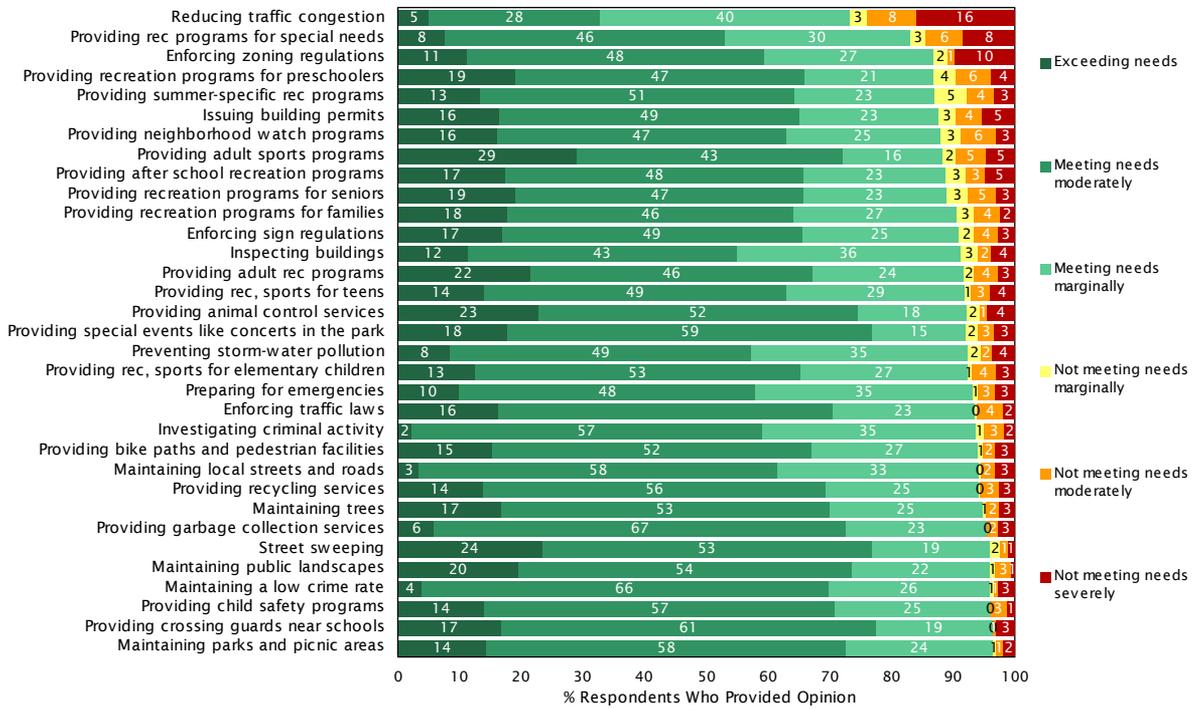
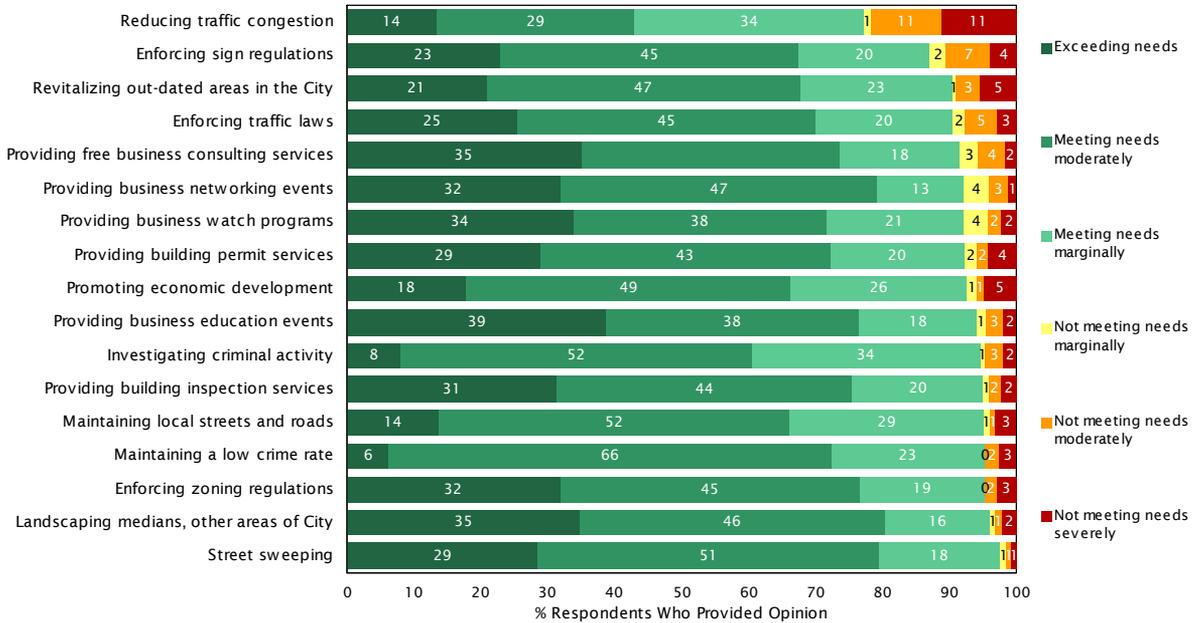


FIGURE 33 SERVICE NEEDS: BUSINESS SURVEY



RECREATION

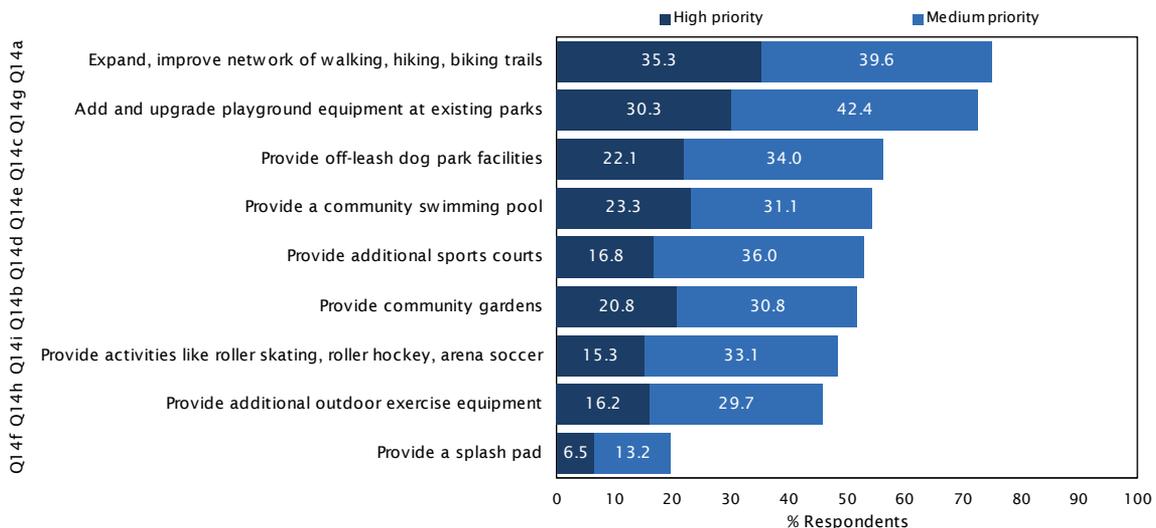
It is often the case that residents' needs for public facilities and programs exceed a City's financial resources. In such cases, a town must prioritize projects and programs based upon a variety of factors, including the preferences of its residents.

Question 14 was designed to provide Lake Forest with a reliable measure of how residents prioritize a variety of parks and recreation-related projects and services to which the City could allocate resources in the future. The format of the question was straightforward: after informing respondents that the City has the financial resources to provide *some* of the recreational amenities and facilities desired by residents, but not all, respondents were asked whether each project or program shown in Figure 34 should be a high, medium, or low priority for future funding, or if the City should not spend money on the project at all. To avoid a systematic position bias, the projects were tested in a random order for each respondent.

The projects and programs are sorted in Figure 34 from high to low based on the percentage of respondents who indicated that an item was *at least* a medium priority for future funding. Among the projects tested, residents assigned the highest priority to expanding and improving the network of walking, hiking, and biking trails (75% high or medium priority), and adding and upgrading playground equipment at existing parks (73%). At the other end of the spectrum, residents assigned substantially lower priority ratings to providing a splash pad (20%), providing additional outdoor exercise equipment (46%), and providing a rink and activities like roller skating, roller hockey, and arena soccer (48%).

Question 14: Resident Survey *The City of Lake Forest has the financial resources to provide some of the recreational amenities and facilities desired by residents. Because it can't fund every project, however, the City must set priorities. As I read each of the following items, I'd like you to indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future City spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.*

FIGURE 34 RECREATION PRIORITIES: RESIDENT SURVEY



For the interested reader, tables 15 and 16 show how the percentage of residents who rated each project or program as a *high* priority varied by age, presence of a child in the home, and area of residence in the City.

TABLE 15 RECREATION PRIORITIES: RESIDENT SURVEY BY AGE & CHILD IN HOME (SHOWING % HIGH PRIORITY)

	Age					Child in Home (QD2)	
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No
Expand, improve network of walking, hiking, biking trails	39.6	22.4	34.5	39.8	34.6	35.0	37.4
Add and upgrade playground equipment at existing parks	29.9	46.7	34.5	22.9	26.6	42.1	23.6
Provide a community swimming pool	26.2	44.3	23.2	16.5	17.2	31.8	18.2
Provide off-leash dog park facilities	20.5	17.7	20.7	25.8	21.6	14.7	27.4
Provide community gardens	15.6	25.1	25.5	20.5	17.6	25.4	19.0
Provide additional sports courts	17.1	25.8	15.8	14.5	15.2	17.6	17.0
Provide additional outdoor exercise equipment	21.1	21.2	8.2	16.9	15.5	14.2	17.9
Provide activities like roller skating, roller hockey, arena soccer	14.1	17.1	17.7	14.9	13.1	17.3	14.5
Provide a splash pad	0.0	14.4	11.3	2.5	7.8	9.8	4.5

TABLE 16 RECREATION PRIORITIES: RESIDENT SURVEY BY AREA OF CITY (SHOWING % HIGH PRIORITY)

	Area of City			
	One	Two	Three	Four
Expand, improve network of walking, hiking, biking trails	34.1	30.4	34.9	41.5
Add and upgrade playground equipment at existing parks	26.5	22.7	36.1	33.1
Provide a community swimming pool	23.3	23.7	26.0	19.2
Provide off-leash dog park facilities	24.3	23.1	22.8	18.2
Provide community gardens	13.2	19.3	24.1	25.4
Provide additional sports courts	15.2	16.8	15.7	19.9
Provide additional outdoor exercise equipment	15.3	20.9	14.0	15.4
Provide activities like roller skating, roller hockey, arena soccer	14.6	18.2	15.5	13.1
Provide a splash pad	3.3	10.7	6.3	6.2



In nearly all southern California cities, traffic congestion ranks among the most pressing problems that residents would like local and regional governments to address. As noted previously in this report (see Figure 8 on page 16), a reduction in traffic congestion was the most frequently mentioned specific improvement that residents feel is needed to make Lake Forest a better place to live.

TRAFFIC IN AND AROUND LAKE FOREST To drill deeper on this issue and to establish a benchmark for future surveys, the 2014 survey asked residents to indicate on what percentage of their trips they encounter bad traffic congestion for each of three general areas: Orange County freeways, major streets within the City, and residential areas within the City. As shown in Figure 35, residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (56%) of their trips. Trips on major streets in the City were slightly better, with an average of 45% involving bad congestion, compared with roughly 20% of trips in residential areas of the City.

Question 15: Resident Survey *Next, I'd like to ask you about traffic congestion. When you are driving: _____, about what percentage of your trips do you encounter bad traffic congestion? If needed: Zero percent means you never encounter bad traffic congestion, whereas 100% means you always encounter bad traffic. You can use any number between 0 and 100.*

FIGURE 35 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY

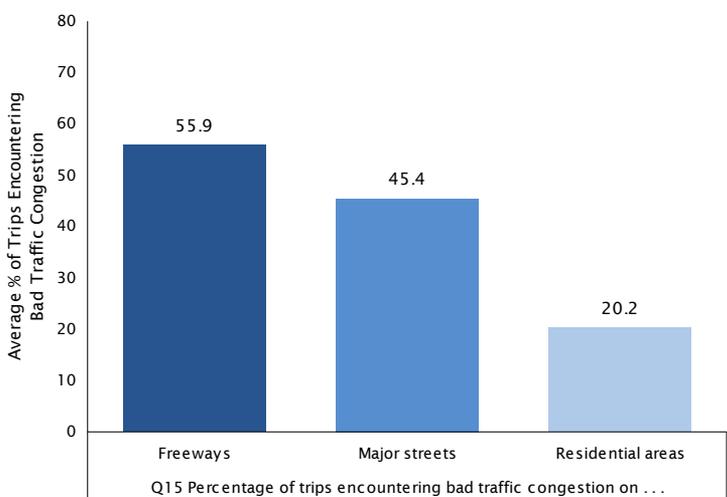


Figure 35 on the next page presents the results of this question by the area of the City in which the resident resides, showing the average percentage of trips that involve bad traffic congestion. The average percentage of trips with bad congestion on Orange County freeways and major streets in the City did not differ considerably by the respondents' area of residence. However, respondents who live in Area Four reported encountering bad traffic in residential areas, on average, almost twice as often as those who live in Area Three (27% of trips vs. 15%).

FIGURE 36 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY BY AREA OF CITY



TRAFFIC COMPARED WITH OTHER ORANGE COUNTY CITIES As a follow-up to Question 15, residents were asked to compare traffic circulation in Lake Forest with that in other cities in Orange County. As shown in Figure 37 below, most (84% of) residents felt that Lake Forest has either less than (45%) or about the same (39%) traffic congestion as neighboring Orange County cities. A minority (14%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities. For the interested reader, Figure 38 on the next page provides the responses to this question by the respondents’ length of residence and area of the City.

Question 16: Resident Survey *When compared to traffic congestion in other Orange County cities, would you say that the amount of traffic congestion within Lake Forest is less, about the same, or more?*

FIGURE 37 TRAFFIC CONGESTION COMPARED WITH OTHER ORANGE COUNTY CITIES: RESIDENT SURVEY

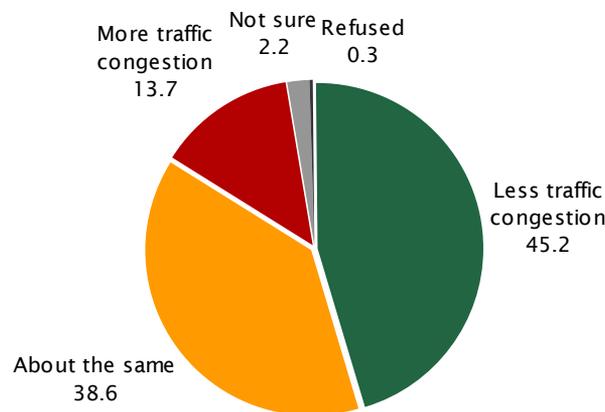
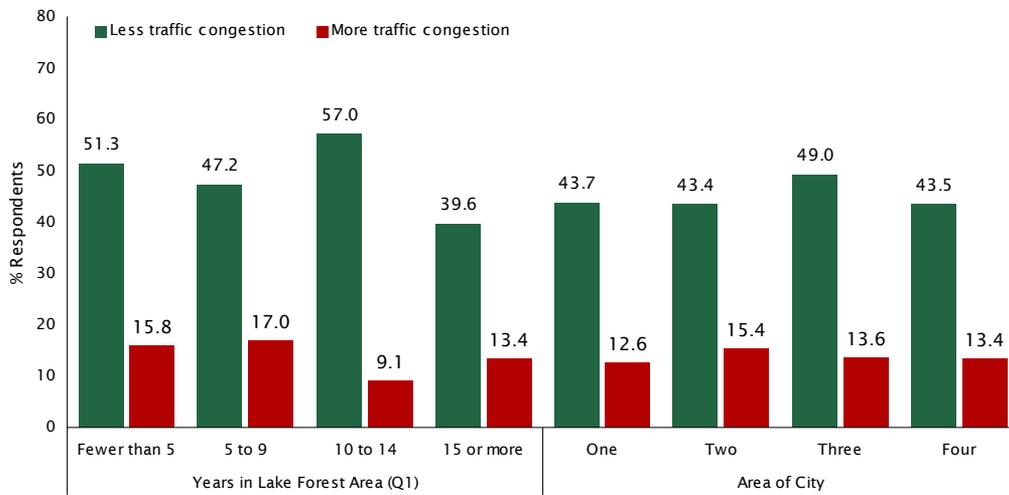


FIGURE 38 TRAFFIC CONGESTION COMPARED WITH OTHER ORANGE COUNTY CITIES: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & AREA OF CITY



SATISFACTION WITH EFFORTS TO IMPROVE CIRCULATION The Lake Forest Traffic Division and the City’s Engineering Services work together to address day-to-day traffic operations, safety issues, and future transportation needs for the City of Lake Forest. The next question in this section of the survey asked respondents about their satisfaction with City *efforts* to improve traffic circulation. Figure 39 shows that 72% of residents indicated they were very (34%) or somewhat (38%) satisfied with the City’s efforts to improve circulation, whereas 26% were very (10%) or somewhat (16%) dissatisfied. Figure 40 on the next page provides the responses to Question 17 by the respondents’ length of residence, area of the City, and their opinion of how traffic in Lake Forest compares to other Orange County cities.

Question 17: Resident Survey *Generally speaking, are you satisfied or dissatisfied with the City's efforts to improve traffic circulation by improving roads and intersections, timing traffic signals, and other measures?*

FIGURE 39 SATISFACTION WITH CITY EFFORTS TO IMPROVE TRAFFIC CIRCULATION: RESIDENT SURVEY

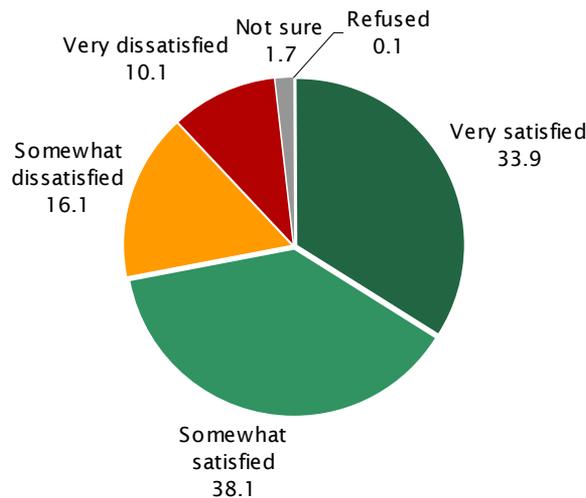
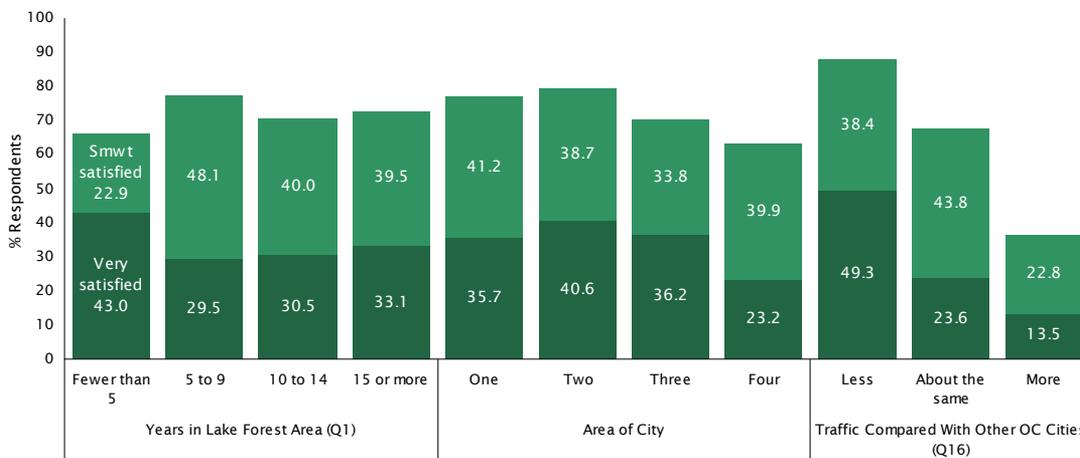


FIGURE 40 SATISFACTION WITH CITY EFFORTS TO IMPROVE TRAFFIC CONGESTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & TRAFFIC COMPARED WITH OTHER OC CITIES

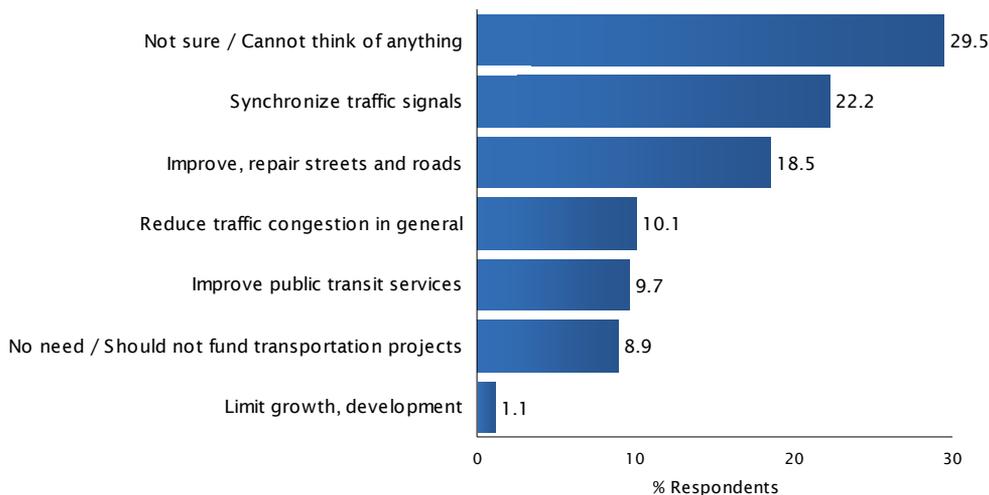


MOST DESIRED TRAFFIC OR TRANSPORTATION PROJECT The final question of this series asked residents if the City could fund only one traffic or transportation-related project, what should it be? The question was asked in an open-ended manner, allowing respondents to mention any project that came to mind without being prompted by or restricted to a particular list of options. The responses were later grouped into the categories presented in Figure 41.

Almost a third (30%) of respondents were unsure or could not think of any traffic or transportation-related projects for funding. Adjusting the timing of traffic signals (22%) and making improvements and repairs to local streets (19%) were the most common specific suggestions, followed by a general desire for less traffic congestion (10%) and improved public transit services (10%). An additional 9% of residents surveyed said the City should not fund any transportation projects.

Question 18: Resident Survey *If the City could fund only one traffic or transportation-related project, what should it be? Please be specific.*

FIGURE 41 DESIRED TRAFFIC, TRANSPORTATION PROJECTS: RESIDENT SURVEY



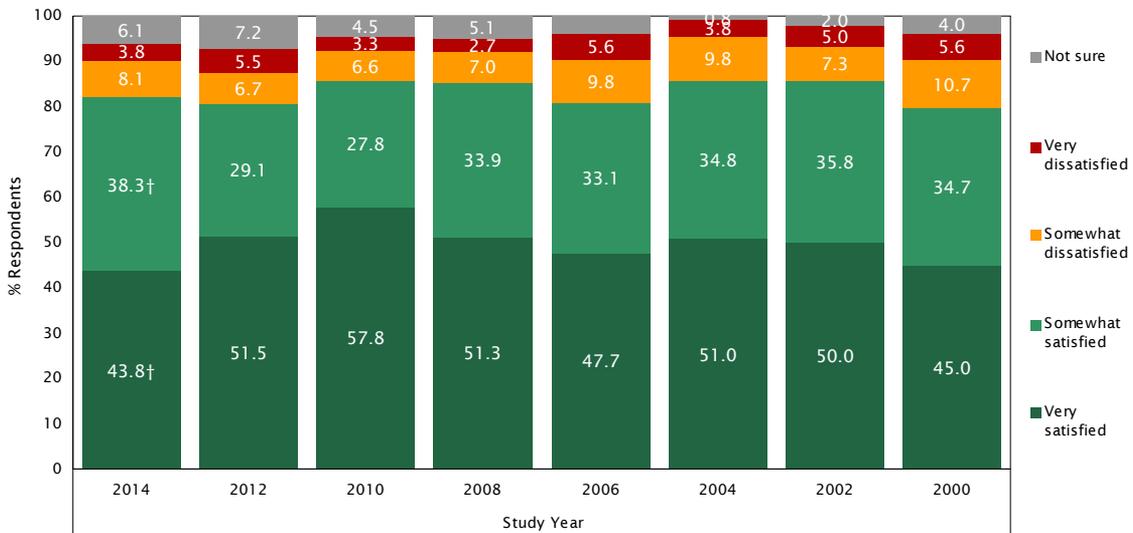
COMMUNICATION

The importance of City communication with residents and local businesses cannot be overstated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the City to the community and from the community to the City. This study is just one example of Lake Forest's efforts to enhance the information flow to the City to better understand the community's concerns, perceptions, and needs. Some of Lake Forest's many efforts to communicate with its residents and local business community include its newsletters, timely press releases, and its various websites. In this section of the report, we present the results of several communication-related questions from the resident and business surveys.

SATISFACTION WITH COMMUNICATION EFFORTS Residents and businesses were asked to report their overall satisfaction with the City's efforts to communicate with them through newsletters, the Internet, social media, and other means. Overall, 82% of residents indicated that they were either very (44%) or somewhat (38%) satisfied with the City's communication efforts, which is comparable to the overall satisfaction rating from 2012, although there was a reduction in the *intensity* of that satisfaction (Figure 42).

Question 19: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means?*

FIGURE 42 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2014 ~ 2000)



† Statistically significant difference ($p < 0.05$) between the 2012 and 2014 studies.

At least seven-in-ten residents in each demographic subgroup were satisfied with the City's communication efforts, although newer residents tended to be less satisfied than their counterparts (see figures 43 and 44 on the next page).

FIGURE 43 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME

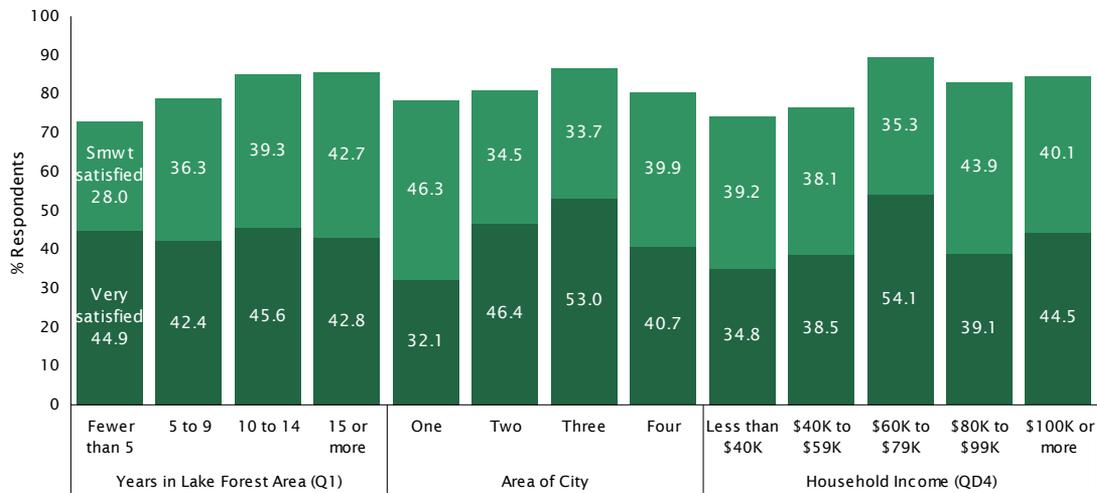
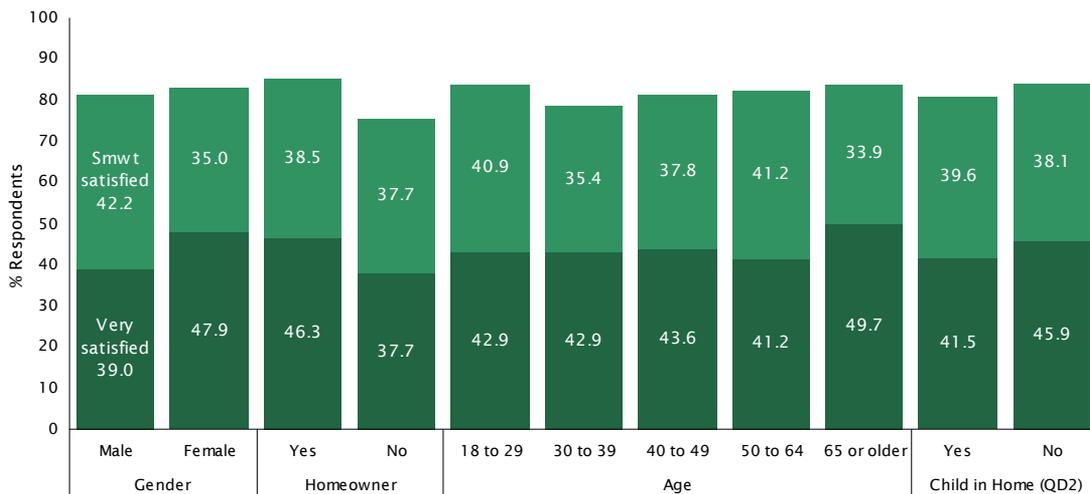


FIGURE 44 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY GENDER, HOMEOWNER, AGE & CHILD IN HOME



Among local businesses, satisfaction with the City’s communication efforts has trended in a positive direction since 2006. In the current study, 88% of business managers surveyed indicated that they were satisfied with the City’s efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means, and 8% said they were dissatisfied (Figure 45). For the interested reader, figures 46 and 47 show how satisfaction varied across several demographic subgroups.

Question 11: Business Survey *Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means?*

FIGURE 45 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2014 ~ 2000)

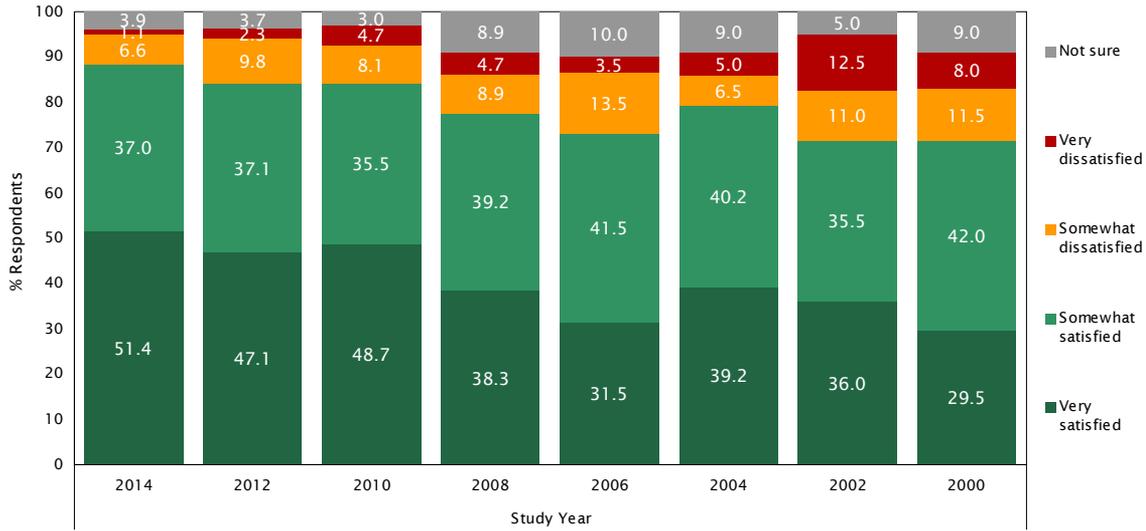


FIGURE 46 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY

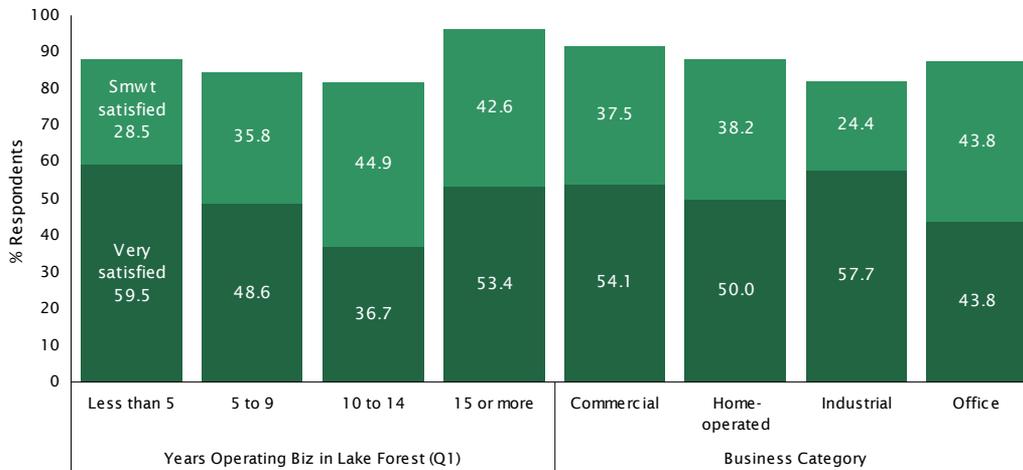
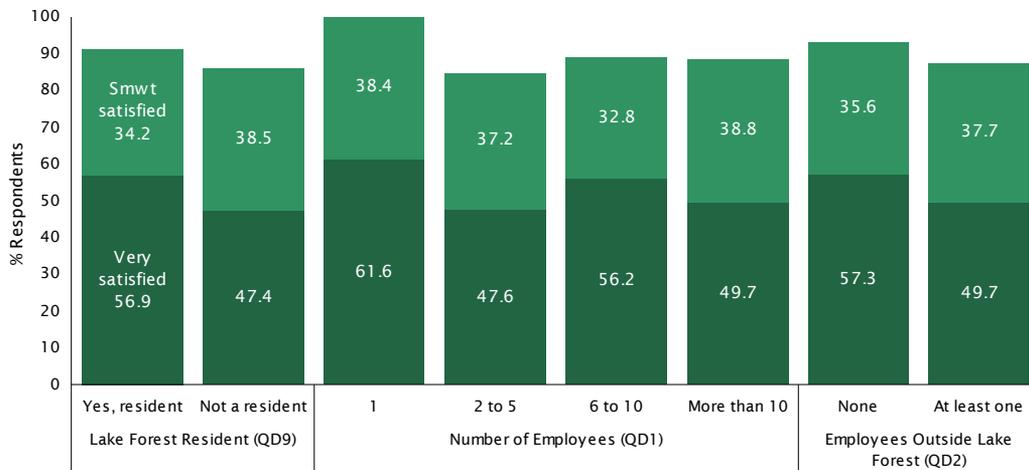


FIGURE 47 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES OUTSIDE LAKE FOREST



New to the 2014 business survey was a question that asked business managers who were dissatisfied with the City’s communication efforts if there was a particular reason for their dissatisfaction. Because so few respondents (a total of 9 businesses surveyed) were dissatisfied with communication and provided a reason for their dissatisfaction, the specific verbatim responses are shown below. Most responses mentioned a perceived lack of information sources or proactive outreach efforts from the City.

Question 12: Business Survey *Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Please be specific.*

- I cannot think of one time that the city tried to communicate with us.
- I don't communicate with them too much because of one time when I reached out to them. We had a security breach, and the door wouldn't close all the way. I reached out to the police department and asked them to drive by during the night. They flat out refused and were very rude. They refused to send anyone during the night, but, the following day, the police hung out by my store for two hours and handed out violations.
- I don't get any kind of mailings or anything like that.
- I haven't really received any kind of communication from them.
- I'd like to see more social media and e-information. They do a good job with magazines.
- The city has never communicated with my business.
- There are not that many events. There has only been one or two in the last year.
- They do not publicize when they're having counsel or town meetings open to the public.
- We don't ever see anything from the city by postal or electronic mail here. All our bills go directly to our main office.

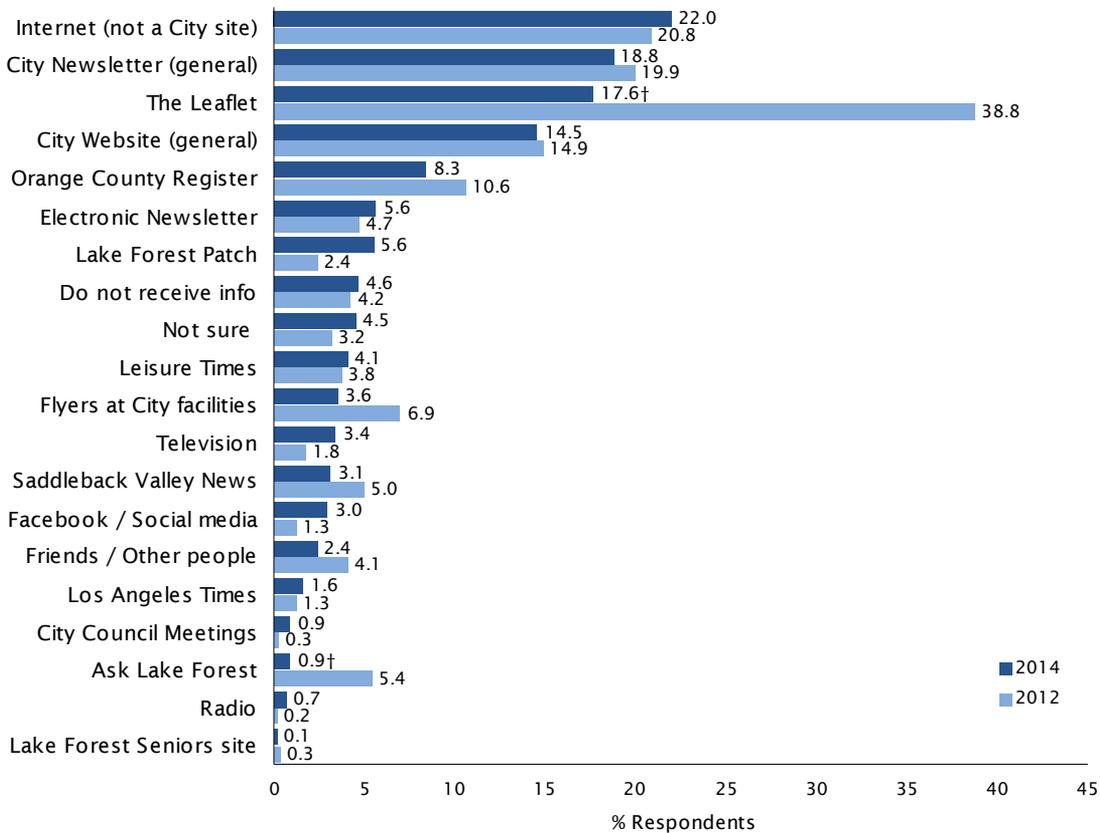
INFORMATION SOURCES Residents and businesses were next asked to indicate the sources they use to find out about the City of Lake Forest news, information, and programming. This question was asked in an open-ended format, and respondents were allowed to report up to three sources of information. Thus, the percentages shown in the following figures reflect the percentage of residents and business managers who mentioned a given information source.

As presented in Figure 48, the single most frequently cited source of City information among residents in 2014 was the Internet in general (22%). The City’s newsletter, referred to in general (19%) and mentioned by name, *The Leaflet*, (18%) were the next most popular specific mentions, followed by the City’s website (15%), the *Orange County Register* (8%), and the City’s e-Newsletter (6%). When compared with the 2012 survey results, specific mention of *The Leaflet* saw a substantial statistically significant decrease (-21%). There was also a significant drop in mentions of Ask Lake Forest, the City’s online citizen request program (-5%).

To summarize the wide variety of information sources mentioned and more easily compare the results between years and demographic subgroups, Figure 49 on the next page provides the responses to this question, with specific sources grouped into larger meaningful categories. Because survey respondents were allowed to mention multiple sources, the percentages in this figure represent the percentage of residents who mentioned at least one source that fits within each category. As shown in the figure, 44% of residents surveyed in 2014 mentioned at least one of Lake Forest’s newsletters as a source of City information, compared with 62% in 2012. Thirty-one percent (31%) mentioned a non-City website or Internet in general, up from 25% in the prior survey, and 16% cited one of the City’s websites, which is down from 21%.

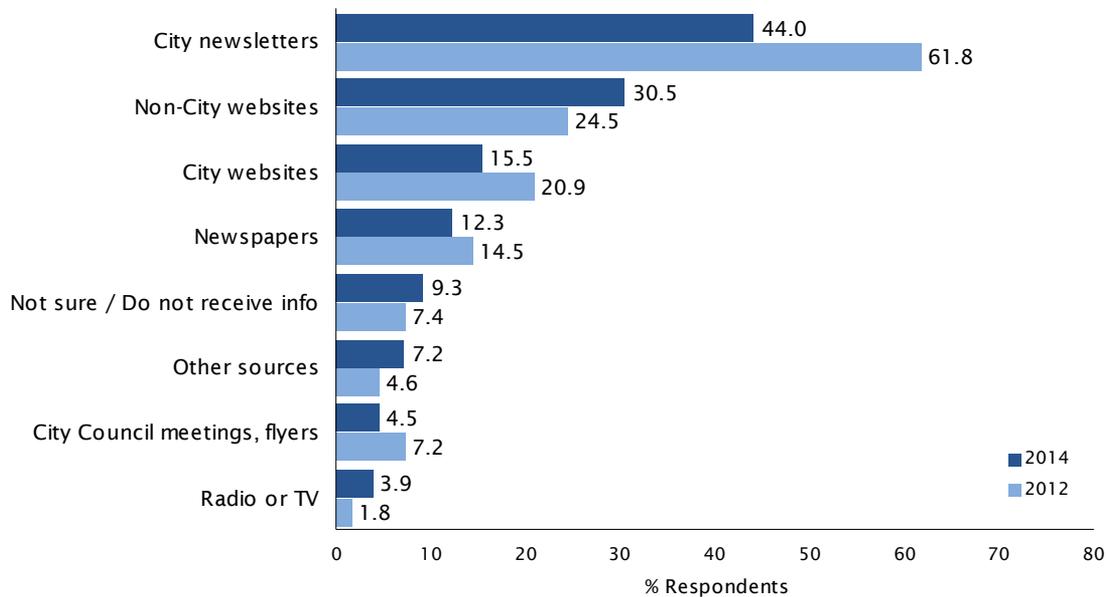
Question 20: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information and programming?*

FIGURE 48 SPECIFIC INFORMATION SOURCES: RESIDENT SURVEY (2014 ~ 2012)



† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

FIGURE 49 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY (2014 ~ 2012)



Figures 50 and 51 present the information source categories by age, homeownership status, presence of a child in the home, and satisfaction with the City’s communication efforts. For ease of interpretation, the bars representing City-sponsored sources are displayed in shades of green, and non-City sources in shades of orange. One of the key findings from the figures is that in general, younger residents, renters, and those currently dissatisfied with the City’s communication efforts were considerably more likely than their counterparts to rely on information sources that are not directly sponsored by the City (e.g., the Internet in general, radio, and television).

FIGURE 50 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY AGE

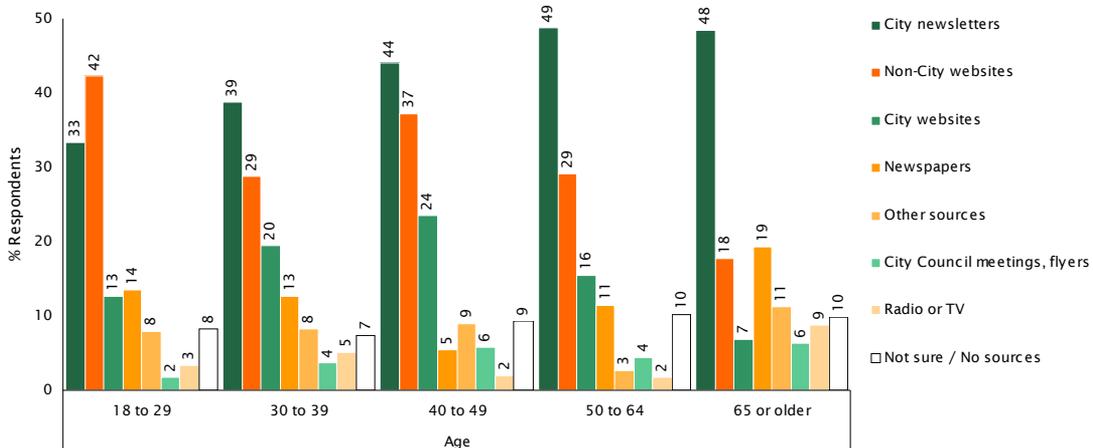
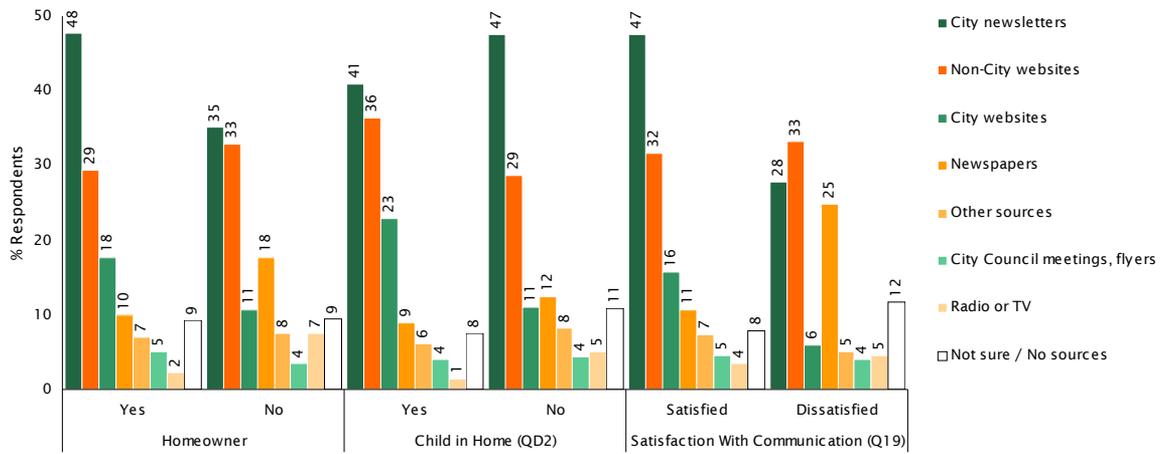


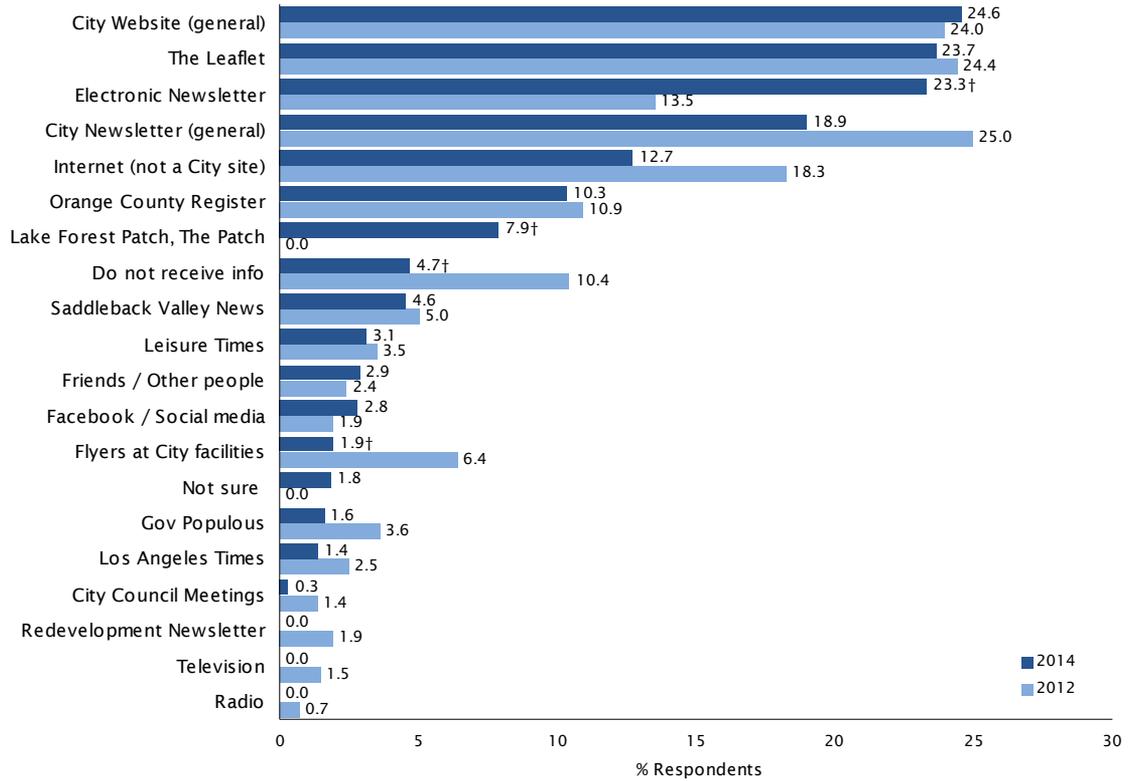
FIGURE 51 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY HOMEOWNER, CHILD IN HOME & SATISFACTION WITH COMMUNICATION



As shown in Figure 52 on the next page, when asked what information sources they rely on for Lake Forest news, information, and programming, members of the business community were most likely to mention the City’s website in general (25%), *The Leaflet* (24%), the e-Newsletter (23%), and the City newsletter in general (19%). Other commonly mentioned sources included the Internet in general (13%), the *Orange County Register* (10%), and *The Patch* (8%). When compared with 2012, the percentage of business managers who mentioned that they rely on the e-Newsletter increased significantly (+10%) as did mention of *The Patch* (+8%). There were significant decreases in the percentage of business managers who indicated that they do not receive information from the City (-6%) as well as mention of flyers at City facilities (-5%).

Question 13: Business Survey *What information sources do you use to find out about City of Lake Forest news, information and programming?*

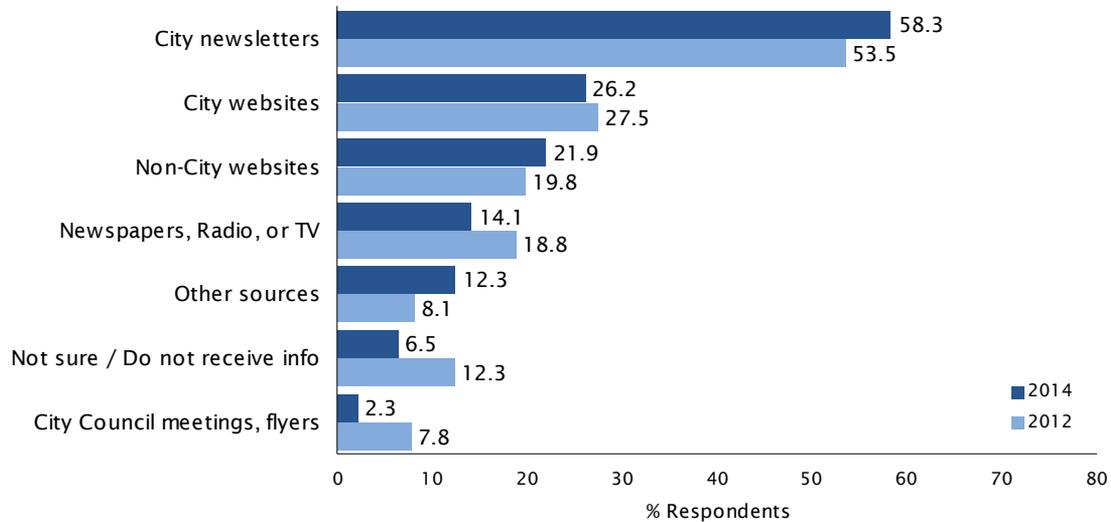
FIGURE 52 INFORMATION SOURCES: BUSINESS SURVEY (2014 ~ 2012)



† Statistically significant difference ($p < 0.05$) between the 2012 and 2014 studies.

In the same manner described above for the resident survey, Figure 53 on the next page provides the responses to this question among business managers, with specific sources grouped into larger meaningful categories. Because respondents were allowed to mention multiple sources, the percentages in the figure represent the percentage of businesses that mentioned at least one source within each category. As shown in the figure, 58% of businesses surveyed in 2014 mentioned at least one of Lake Forest’s newsletters as a source of City information, which is similar to the 54% found in 2012, and 26% mentioned at least one of the City’s websites, similar to 28% in 2012.

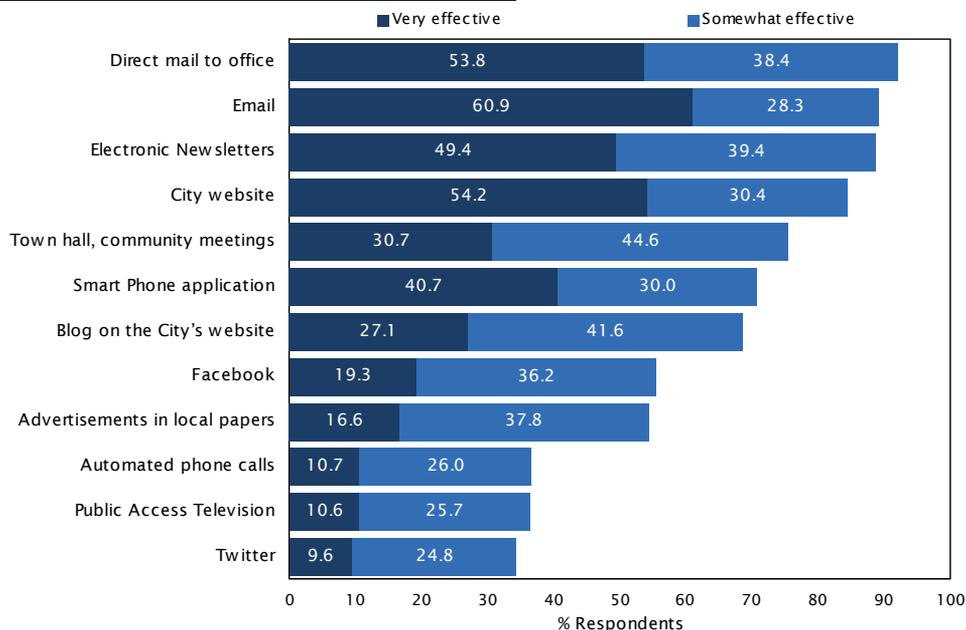
FIGURE 53 INFORMATION SOURCE CATEGORIES: BUSINESS SURVEY (2014 ~ 2012)



EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS The next communication-related question presented local businesses with each of the methods shown on the left of Figure 54 and asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that direct mail to their office was the most effective method (92% very or somewhat effective), followed by email (89%), e-Newsletters (89%), and the City’s website (85%). Twitter (34%), Public Access Television (36%), and automated phone calls (37%), were rated as less effective.

Question 14: Business Survey *As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.*

FIGURE 54 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS



For the interested reader, Table 17 displays how the percentage of local businesses that rated each method of communication as *very* effective differed by business category and overall satisfaction with the City’s communication efforts.

TABLE 17 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS BY BUSINESS CATEGORY & SATISFACTION WITH COMMUNICATION (SHOWING % VERY EFFECTIVE)

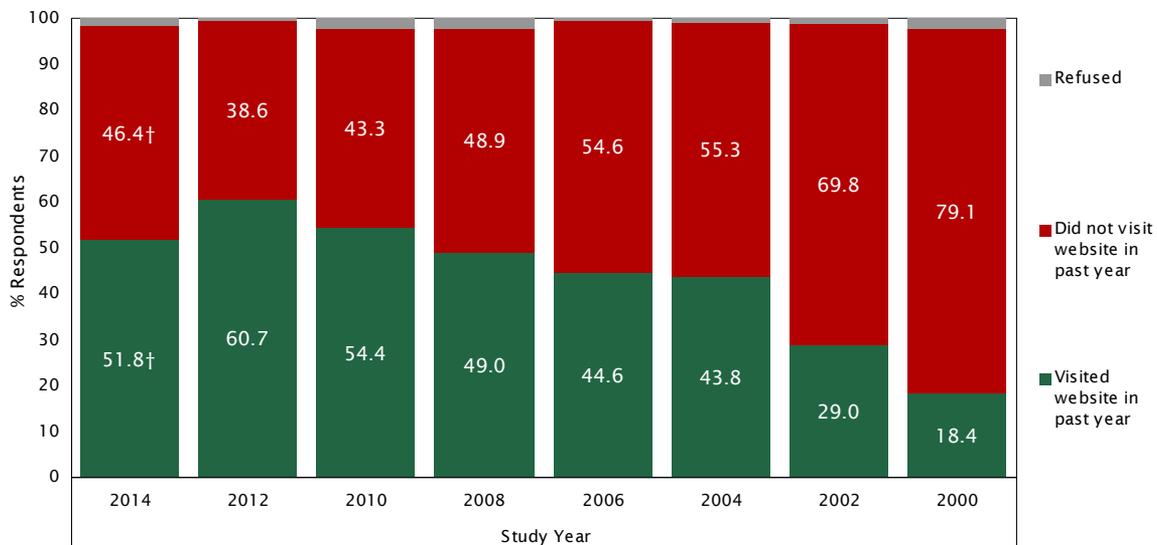
	Business Category				Satisfaction With Communication (Q11)	
	Commercial	Home-operated	Industrial	Office	Satisfied	Dissatisfied
Email	65.1	67.6	48.7	50.0	60.2	55.4
City website	64.8	58.8	33.0	43.8	54.8	45.1
Direct mail to office	61.8	52.9	57.0	37.5	50.1	86.9
Electronic Newsletters	53.0	52.9	44.0	37.5	52.0	18.8
Smart Phone application	51.4	32.4	25.8	43.8	40.1	39.9
Town hall, community meetings	34.3	29.4	21.9	31.3	31.4	27.3
Blog on the City’s website	31.7	23.5	21.1	25.0	27.6	26.2
Facebook	23.4	20.6	2.5	18.8	19.2	18.4
Advertisements in local papers	22.0	8.8	11.1	18.8	17.3	16.7
Automated phone calls	10.2	11.8	9.5	9.4	10.8	14.7
Public Access Television	18.1	5.9	9.5	3.1	10.9	13.1
Twitter	16.3	8.8	0.0	6.3	10.8	0.0

CITY WEBSITES The City of Lake Forest has been a leader among municipalities in developing websites tailored to different subgroups in the community. It is naturally of interest to specifically measure use of the City’s websites, and opinions regarding the content of the sites.

Figure 55 shows that the percentage of residents who visited the City’s website has grown substantially since the 18% recorded in 2000, although the 52% found in the current study represents a statistically significant decrease from 2012. Figures 56 and 57 on the next page show how use of the City’s websites in the past year varied by key resident subgroups.

Question 21: Resident Survey *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

FIGURE 55 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY (2014 ~ 2000)



† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

FIGURE 56 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & CHILD IN HOME

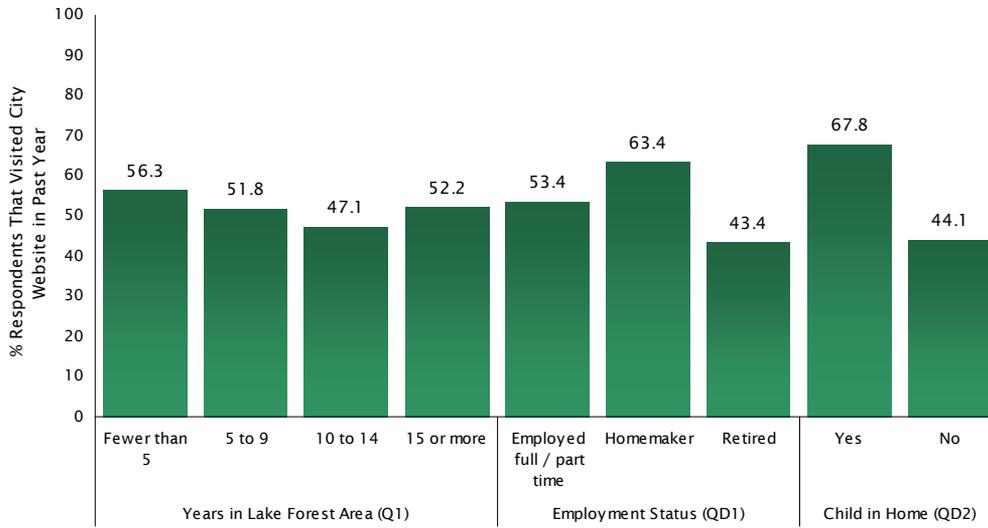
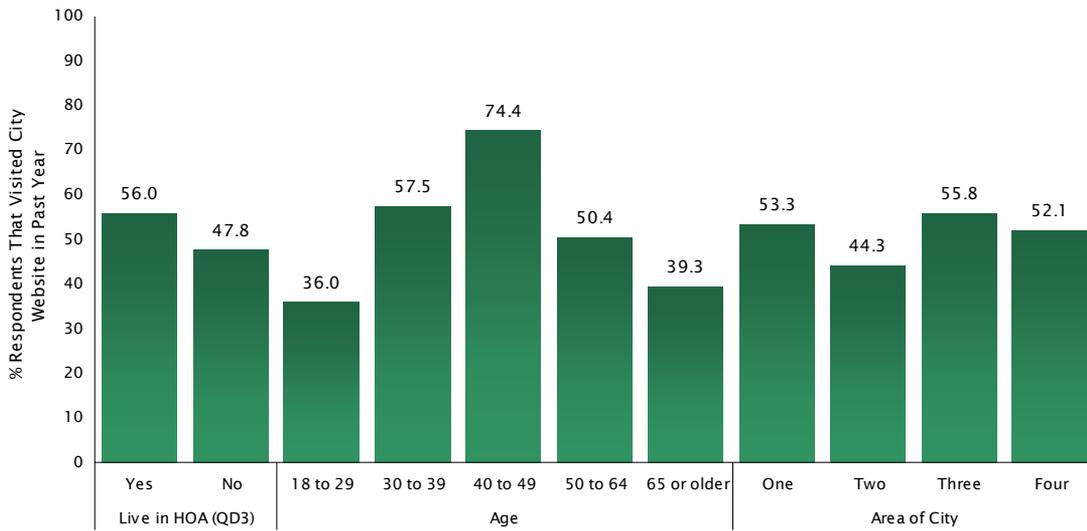


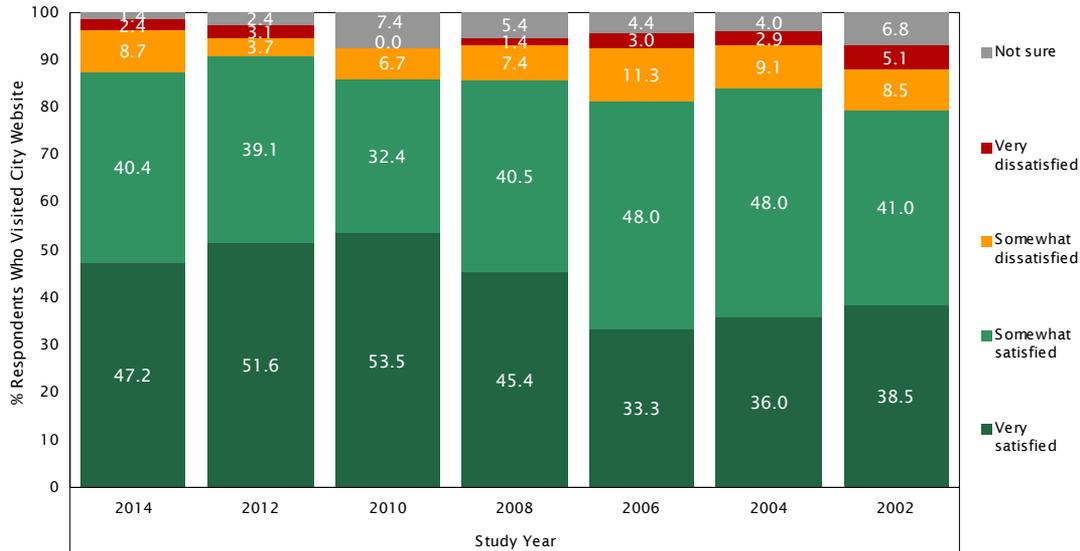
FIGURE 57 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY



WEBSITE CONTENT Visitors to the City’s websites were next asked to rate their level of satisfaction with the resources and content available on the sites—the results of which are shown in Figure 58. Overall, visitors expressed high levels of satisfaction with the City’s websites, with 88% of residents indicating they were satisfied with the resources available on the sites. There were no statistically significant changes from the 2012 survey results.

Question 22: Resident Survey *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

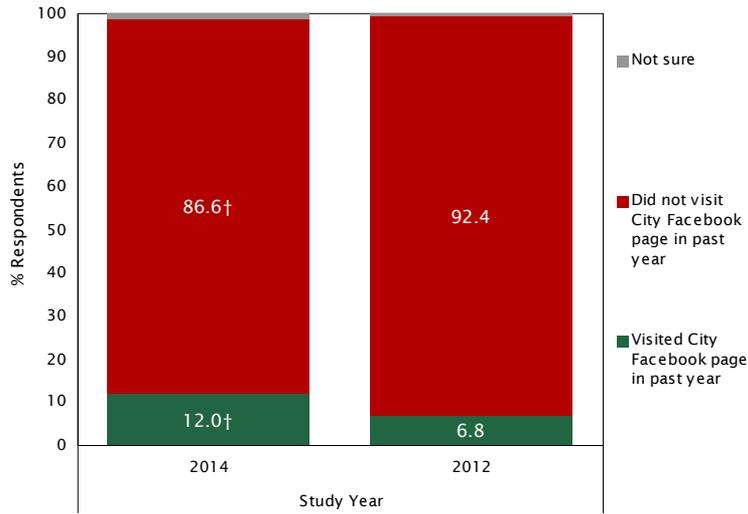
FIGURE 58 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2014 ~ 2002)



CITY OF LAKE FOREST FACEBOOK PAGE Added in the 2012 resident survey, the next question simply asked the respondent if he or she had visited the City of Lake Forest’s Facebook page in the past year. As presented in Figure 59 on the next page, 12% of residents surveyed indicated that they had visited the City’s Facebook page in the past year, which represents a statistically significant increase from the 2012 study (+5%). Figure 60 presents the results of this question by the presence of a child in the home, age of the respondent, and household income.

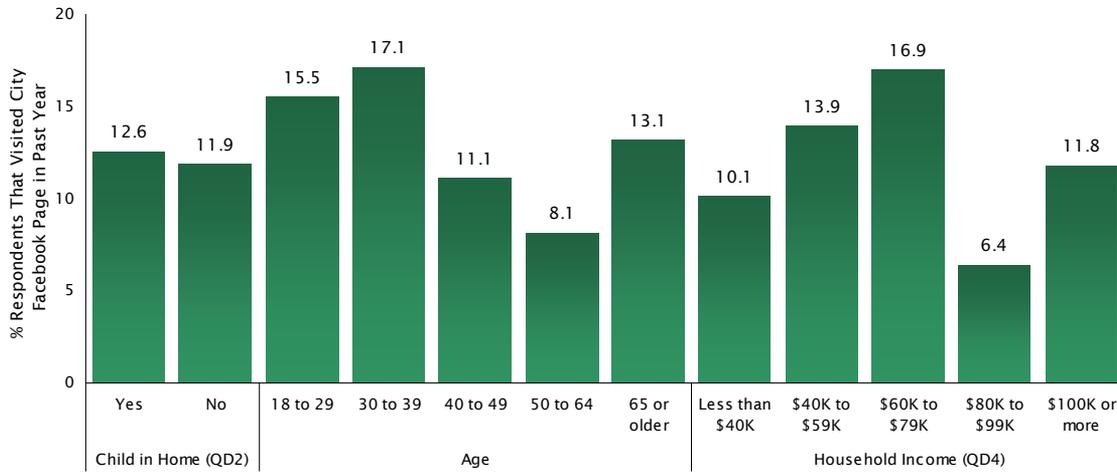
Question 23: Resident Survey *In the past year, have you visited City of Lake Forest's Facebook page?*

FIGURE 59 VISITED CITY OF LAKE FOREST FACEBOOK PAGE IN PAST YEAR: RESIDENT SURVEY (2014 ~ 2012)



† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

FIGURE 60 VISITED CITY OF LAKE FOREST FACEBOOK PAGE IN PAST YEAR: RESIDENT SURVEY BY CHILD IN HOME, AGE & HOUSEHOLD INCOME



COMMUNICATION PREFERENCES The final communication-related question of the resident survey presented respondents with the methods shown on the left of Figure 61 and asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that newsletters mailed directly to their home was the most effective method (89% very or somewhat effective), followed by the City website (77%), email (72%), e-newsletters (71%), and a smart phone application (66%). Residents overall rated Twitter (34%), automated phone calls (41%), and Public Access Television (47%) as the least effective ways for the City to communicate with them. For the interested reader, Table 18 shows how the percentage of residents that rated each communication method as *very effective* differed by age subgroup and presence of a child in the home.

Question 24: Resident Survey *As I read the following ways that the City of Lake Forest can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with you.*

FIGURE 61 EFFECTIVENESS OF COMMUNICATION METHODS: RESIDENT SURVEY

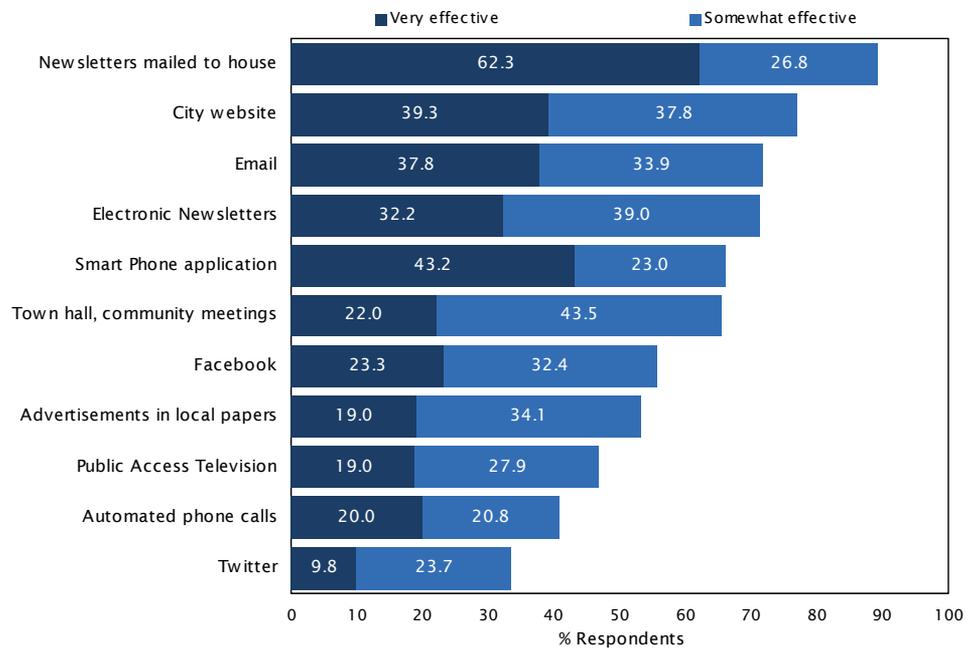


TABLE 18 EFFECTIVENESS OF COMMUNICATION METHODS: RESIDENT SURVEY BY AGE & CHILD IN HOME (SHOWING % VERY EFFECTIVE)

	Age					Child in Home (QD2)	
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No
Newsletters mailed to house	50.2	57.1	67.7	65.4	64.8	63.3	63.8
Smart Phone application	50.4	56.4	63.2	36.9	18.4	56.0	35.5
City website	40.1	55.9	58.4	28.7	25.2	50.5	32.7
Email	42.1	45.2	46.0	29.1	35.3	46.6	33.0
Electronic Newsletters	28.8	44.2	35.4	29.9	27.0	39.2	29.1
Facebook	26.9	29.3	32.4	21.4	9.8	32.3	18.7
Town hall, community meetings	23.5	21.0	12.0	24.5	27.8	16.8	25.3
Automated phone calls	17.9	21.8	19.8	20.2	20.4	25.2	17.4
Advertisements in local papers	21.2	15.4	23.0	16.1	20.8	17.6	19.9
Public Access Television	16.9	25.0	12.4	17.6	25.2	16.7	20.6
Twitter	11.8	14.5	11.1	7.0	8.2	11.7	8.1

ECONOMIC DEVELOPMENT WEBSITE First asked in 2010, Question 15 of the business survey asked respondents whether they had ever visited the City’s economic development website at www.lakeforestbusiness.com. As shown in Figure 62, in the present survey 42% of local businesses indicated that they had visited the site, which is higher than the value recorded in 2012, but the difference is not statistically significant. Figure 63 presents the findings of this question by a variety of demographics.

Question 15: Business Survey *Have you ever visited the City's economic development website at www.lakeforestbusiness.com?*

FIGURE 62 VISITED ECONOMIC DEVELOPMENT WEBSITE (2014 ~ 2010)

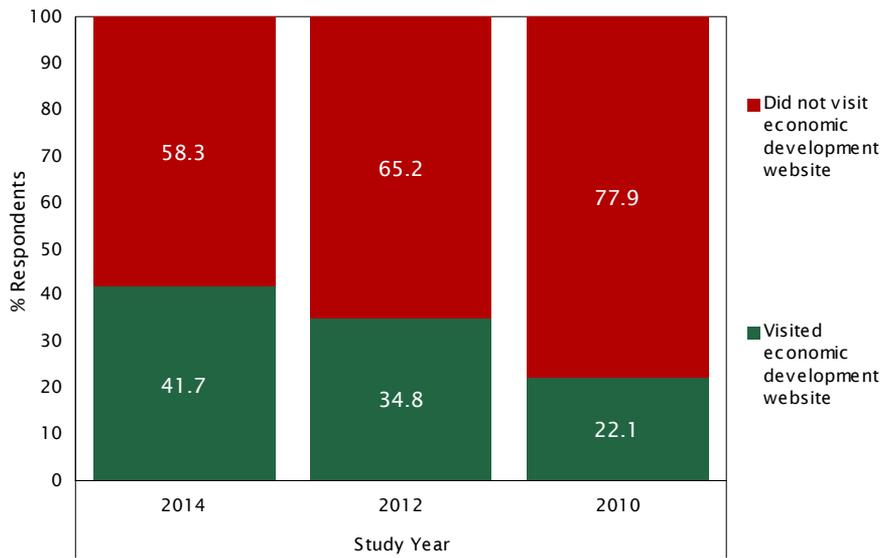
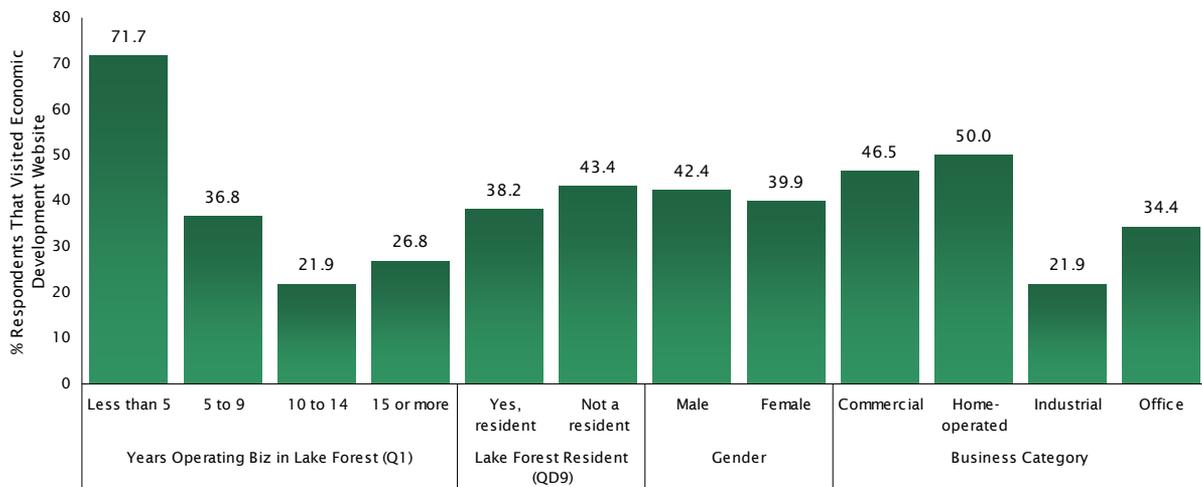


FIGURE 63 VISITED ECONOMIC DEVELOPMENT WEBSITE BY YEARS OPERATING BIZ IN LAKE FOREST, LAKE FOREST RESIDENT, GENDER & BUSINESS CATEGORY



Regardless of whether they had previously visited the City’s economic development website, local businesses were next asked to rate their level of interest in a variety of topics that could be addressed on the site to keep it relevant and informative. As shown in Figure 64, respondents expressed the highest levels of interest in a Shop and Dine directory of local businesses (83% very or somewhat interested), followed by Business and Financial resource guides (79%) and information on business seminars and workshops (74%).

Table 19 compares the levels of interest between 2014 and 2012 and shows that despite fluctuation of interest in both directions for many of the topics, there were no statistically significant changes between the two studies. Table 20 on the next page shows how interest in these topics varied by type of business and recent economic development website visit.

Question 16: Business Survey *The City wants to ensure that the economic development website is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.*

FIGURE 64 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS

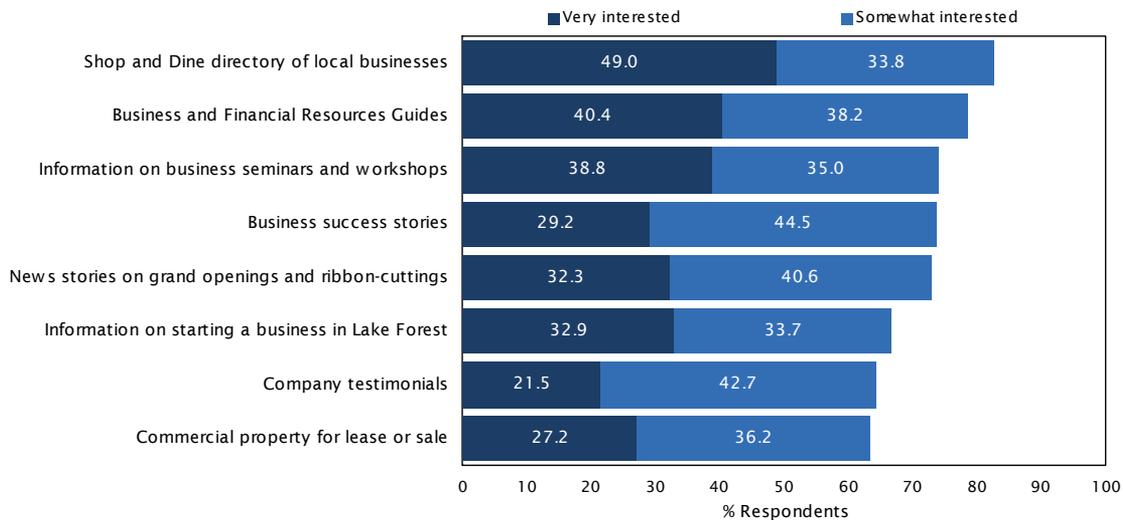


TABLE 19 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS (2014 ~ 2012)

	Study Year		Change in Very + Smwt Interested
	2014	2012	
Information on starting a business in Lake Forest	66.6	59.3	+7.3
Company testimonials	64.2	57.7	+6.5
Shop and Dine directory of local businesses	82.8	78.6	+4.1
Business and Financial Resources Guides	78.5	77.8	+0.7
Commercial property for lease or sale	63.5	64.1	-0.6
Business success stories	73.7	75.3	-1.6
Information on business seminars and workshops	73.8	76.0	-2.2
News stories on grand openings and ribbon-cuttings	72.8	79.7	-6.8

TABLE 20 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS BY BUSINESS CATEGORY & VISITED ECONOMIC DEVELOPMENT WEBSITE (SHOWING % VERY INTERESTED)

	Business Category				Visited Economic Development Website (Q15)	
	Commercial	Home-operated	Industrial	Office	Yes	No
Shop and Dine directory of local businesses	58.7	44.1	38.9	43.8	55.7	44.2
Business and Financial Resources Guides	39.2	47.1	54.6	25.0	53.0	31.3
Information on business seminars and workshops	30.6	44.1	44.3	40.6	52.4	29.0
Information on starting a business in Lake Forest	36.9	38.2	22.7	28.1	48.8	21.6
News stories on grand openings and ribbon-cuttings	37.9	29.4	31.4	28.1	45.0	23.1
Business success stories	39.7	26.5	13.4	25.0	43.6	18.9
Commercial property for lease or sale	32.2	14.7	27.9	34.4	32.0	23.8
Company testimonials	29.7	20.6	3.3	21.9	30.6	15.0

Question 17 followed up by asking respondents if there were any topics not previously mentioned that the City could address in its newsletter. Most (88% of) respondents desired no additional information in the newsletter. Of those who did, topics varied greatly, limiting the ability or need to categorize responses as presented elsewhere in this report. For the interested reader, the verbatim responses to the question are presented below.

Question 17: Business Survey *Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? If yes, ask: Please briefly describe it to me.*

- City finances and economic development.
- Consulting opportunities with City.
- Exit strategies for family businesses.
- General tips and comments on current trends.
- How to report graffiti.
- Local free housing seminars, especially for veterans and active military.
- Community events.
- Information about moving an online business into a store.
- Improvement in the traffic situation.
- Local retail growth information.
- Non-profit enterprises and child care.
- Redevelopment and urban development.
- SBA and small business loans.
- Anything about technology trends.
- Traffic laws and enforcing them in the city. Tailgating is the number one cause of accidents in our cities. There is distraction of pet lovers when they share the road with big dogs on their laps and no one cares. Smoking in the car or gas stations is so dangerous. Police officers are contacted, but they are not going to issue a ticket as these are not enforced yet. Why? What are we waiting for to prevent this from happening?
- Information about rules and regulations and change in policy updates.
- More publicity about my personal business such as mini storages and self-storage.
- Unique stories.
- Partnerships and bartering among businesses and exchanges as well as job postings.

- Advertise all the businesses in the newsletter for the city of Lake Forest.
- Highlight other government services in the City and what they provide. We are a cemetery district and a lot of people don't know we exist.
- Non-profits in the city.
- What is economics in a layman's wording? Why is Entrepreneurialism so important? America's love affair with Entrepreneurialism.
- What type of signage is legal and what is not.

BUSINESS WORKSHOPS Continuing with the theme of identifying topics and services of interest to local businesses, participants in the business survey were also asked about their interest in attending a variety of seminars the City is considering for local businesses. The seminar topics and respondents' stated interest in each are shown in Figure 65.

Lake Forest businesses expressed the greatest interest in attending business networking events (73% very or somewhat interested), business marketing and sales seminars (72%), and social media and marketing seminars (65%). When compared with 2012, overall interest in the workshops was generally the same or lower, with a statistically significant decrease in seminars pertaining to business legal issues (-15%; see Table 21 on the next page). Table 22 shows how the percentage of respondents who expressed being *very interested* in each seminar topic varied by category of business.

Question 18: Business Survey *The City of Lake Forest also hosts a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.*

FIGURE 65 INTEREST IN BUSINESS WORKSHOP TOPICS

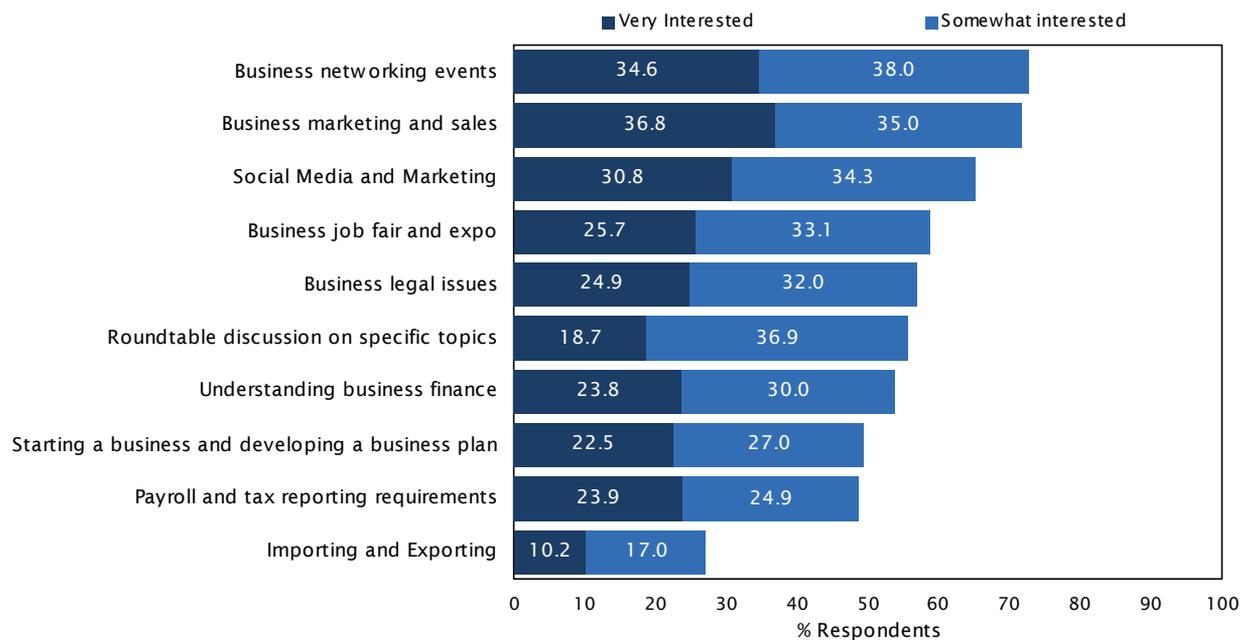


TABLE 21 INTEREST IN BUSINESS WORKSHOP TOPICS (2014 ~ 2012)

	Study Year		Change in Very + Smwt Interested
	2014	2012	
Business networking events	72.6	71.8	+0.8
Starting a business and developing a business plan	49.5	49.0	+0.5
Business marketing and sales	71.8	71.9	-0.1
Business job fair and expo	58.8	61.6	-2.8
Understanding business finance	53.8	57.0	-3.2
Payroll and tax reporting requirements	48.8	54.8	-6.0
Roundtable discussion on specific topics	55.6	64.5	-8.9
Business legal issues	57.0	71.4	-14.5†
Social Media and Marketing	65.0	NA	NA
Importing and Exporting	27.2	NA	NA

† Statistically significant difference (p < 0.05) between the 2012 and 2014 studies.

TABLE 22 INTEREST IN BUSINESS WORKSHOP TOPICS (SHOWING % VERY INTERESTED) BY BUSINESS CATEGORY

	Business Category			
	Commercial	Home-operated	Industrial	Office
Business marketing and sales	34.5	44.1	32.2	34.4
Business networking events	34.7	38.2	26.0	34.4
Social Media and Marketing	36.3	20.6	26.6	37.5
Business job fair and expo	25.6	20.6	15.7	34.4
Business legal issues	27.6	26.5	21.1	21.9
Payroll and tax reporting requirements	32.1	17.6	14.1	25.0
Understanding business finance	26.7	23.5	14.1	25.0
Starting a business and developing a business plan	24.4	20.6	16.3	25.0
Roundtable discussion on specific topics	18.9	17.6	12.6	21.9
Importing and Exporting	11.6	8.8	8.7	9.4

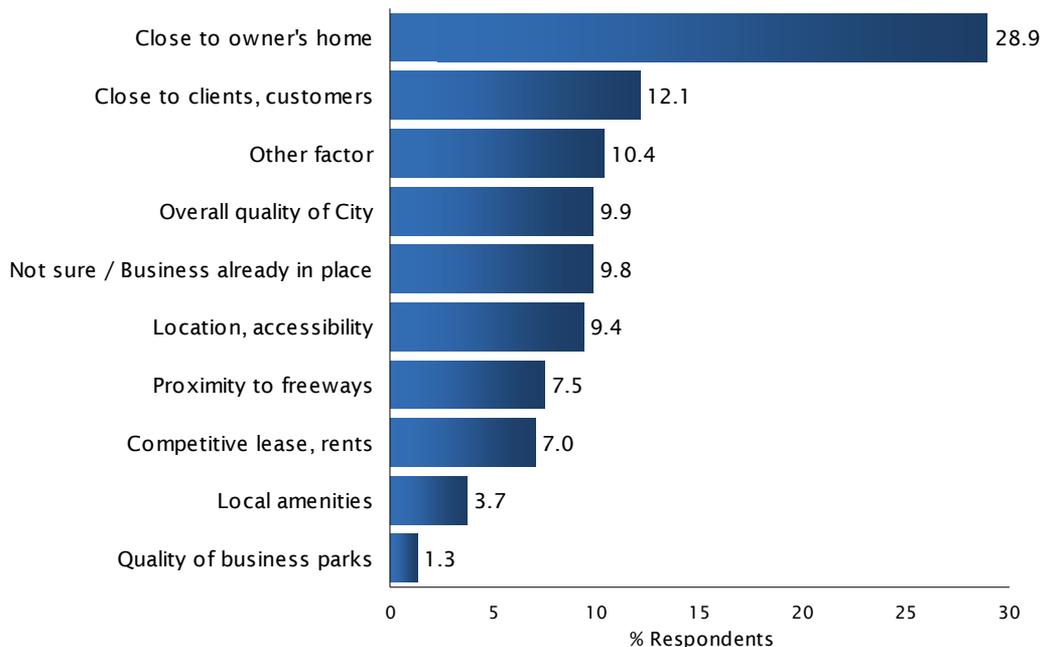
BUSINESS BACKGROUND INFO

At the conclusion of the business survey, respondents were asked several questions about their businesses—including their reasons for locating in Lake Forest, as well as expectations regarding future growth, space requirements, and possible relocation.

REASONS FOR LOCATING IN LAKE FOREST When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, more than one-quarter (29%) indicated that it is close to the owner's home. Approximately 10% of respondents could not provide a response to this question, as the business was already in place when they became affiliated with it. Other specific reasons included the business' proximity to clients and potential customers (12%), overall quality of the City (10%), location and accessibility of the business within the City (9%), and proximity to freeways and surrounding communities (8%).

Question D3: Business Survey What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? Do not read list - record first response

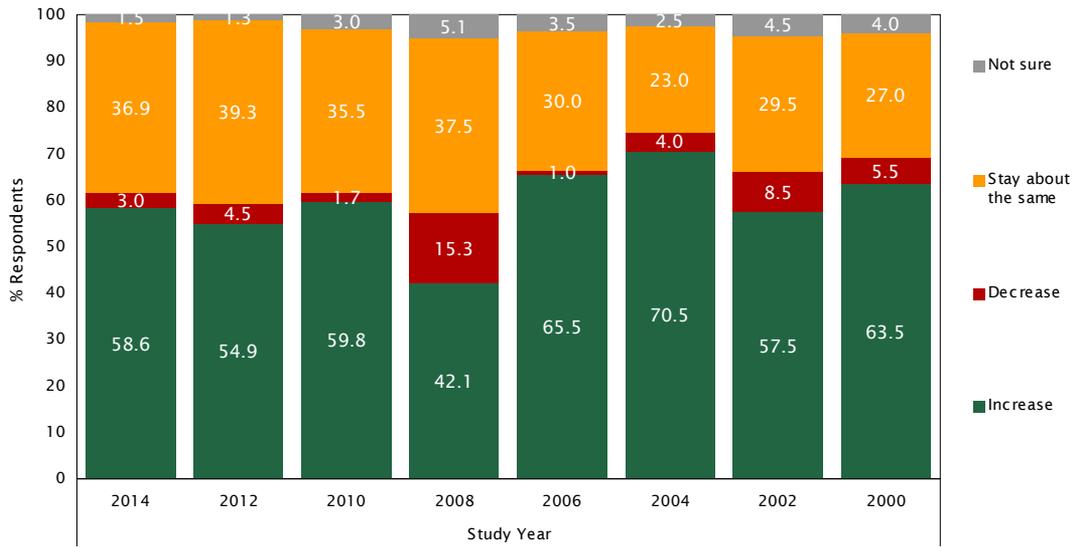
FIGURE 66 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST



GROWTH The next question in this series asked local businesses whether—in the next 12 months—they anticipated that their business will increase, decrease, or stay about the same. The results to this question for 2014 and the prior seven studies are shown in Figure 67 on the next page. As in prior years, local businesses were generally optimistic about their future growth, with 59% anticipating growth and 37% expecting that their business would remain about the same. Just 3% indicated that they expect their business to decrease in the coming year.

Question D4: Business Survey *In the next 12 months, do you think your business will increase, decrease or stay about the same?*

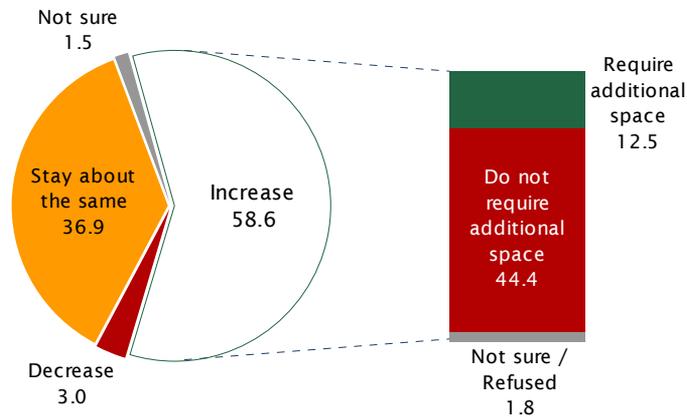
FIGURE 67 BUSINESS SIZE IN NEXT 12 MONTHS (2014 ~ 2000)



Among the 59% of businesses that anticipated growth, 13% indicated that they would require additional space whereas the remaining 46% were either unsure or did not anticipate needing additional space (Figure 68).

Question D5: Business Survey *To accommodate the growth in your business, will you require additional square footage or a larger building?*

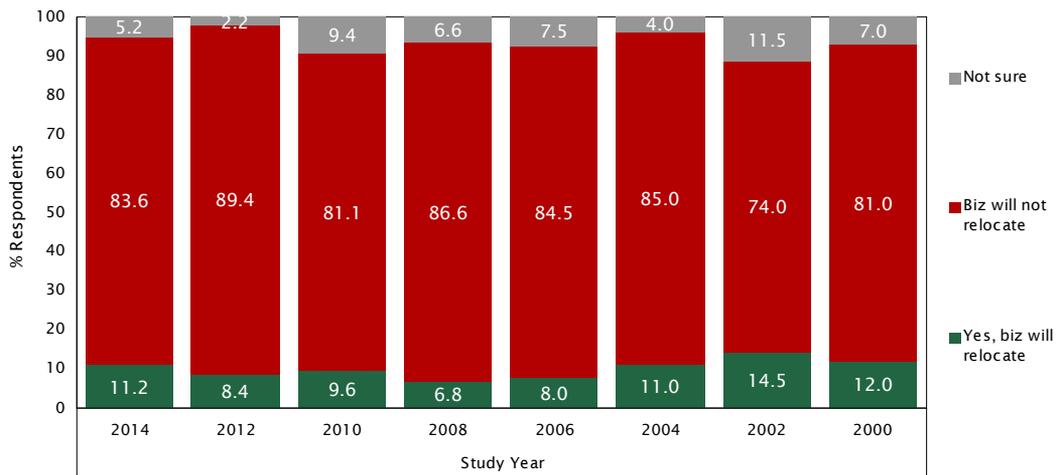
FIGURE 68 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS



RELOCATION The final two substantive questions in the business survey asked respondents whether they anticipated relocating their business in the next year and, if yes, if they were planning to relocate within Lake Forest or to another community. Figure 69 shows that the percentage of businesses that anticipated relocating in the 2014 survey was 11%, which is similar to the rate recorded since 2010. Of the 11% of businesses that anticipated relocating in the next year, approximately half (6%) expected to relocate to another community, 4% within Lake Forest, and 2% were unsure (see Figure 70).

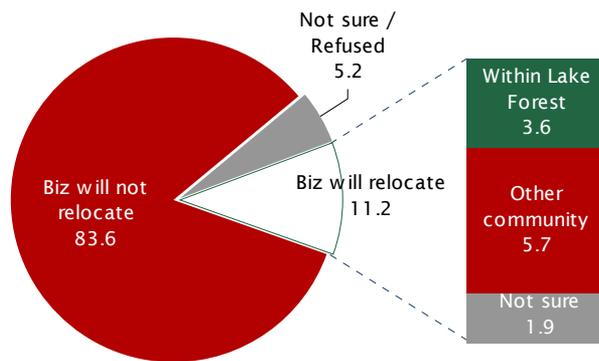
Question D6: Business Survey *In the next 12 months, do you think your business will relocate?*

FIGURE 69 BUSINESS RELOCATION IN NEXT 12 MONTHS (2014 ~ 2000)



Question D7: Business Survey *Will you be relocating your business within Lake Forest or to another community?*

FIGURE 70 BUSINESS RELOCATION IN NEXT 12 MONTHS





BACKGROUND & DEMOGRAPHIC INFO

TABLE 23 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2014 ~ 2002)

Study Year	2014	2012	2010	2008	2006	2004	2002
Total Respondents	400						
QD1 Employment status							
Employed full-time	49.7	56.5	51.2	54.6	58.5	N/A	N/A
Employed part-time	9.4	10.6	9.1	13.7	11.0	N/A	N/A
Student	4.0	5.5	3.6	2.6	3.7	N/A	N/A
Homemaker	9.0	3.2	5.0	8.4	7.9	N/A	N/A
Retired	20.0	18.1	19.2	13.6	16.0	N/A	N/A
In-between jobs	4.3	4.7	9.0	6.0	1.9	N/A	N/A
Refused	3.6	1.5	2.9	0.9	1.1	N/A	N/A
QD2 Child in home							
Yes	36.0	38.7	43.9	41.3	43.4	44.5	44.8
No	60.3	59.8	54.0	58.5	56.4	55.0	54.3
Refused	3.7	1.5	2.1	0.2	0.2	0.5	1.0
QD3 Live in HOA							
Yes	68.8	73.8	75.6	74.8	73.3	72.8	73.3
No	26.9	24.5	22.2	24.4	25.6	26.0	25.3
Refused	4.3	1.7	2.2	0.8	1.1	1.3	1.5
QD4 Household income							
Under \$40K	9.6	10.7	10.6	8.1	7.0	9.5	11.5
\$40K to \$59K	12.0	13.7	11.8	10.1	10.3	14.8	15.3
\$60K to \$79K	10.2	10.1	13.4	13.9	16.8	21.0	12.8
\$80K to \$99K	11.9	12.7	15.8	15.9	10.7	13.3	17.0
\$100K or more	35.6	39.9	36.0	36.6	42.4	31.3	29.3
Not sure / Refused	20.8	12.9	12.5	15.4	12.9	10.3	14.3
QD5 Gender							
Male	46.1	47.7	47.7	47.7	47.5	49.8	49.3
Female	53.9	52.3	52.3	52.3	52.5	50.3	50.8
S1 Party							
Democrat	30.3	28.0	26.7	26.9	25.5	28.3	26.5
Republican	38.8	44.8	49.6	50.2	52.5	50.3	54.8
Other	3.9	3.5	4.9	4.4	5.1	4.3	4.8
DTS	27.0	23.6	18.8	18.5	17.0	17.3	14.0
S2 Age							
18 to 29	14.8	15.3	11.1	13.4	13.4	14.5	14.8
30 to 39	13.9	15.2	15.3	17.2	16.9	20.8	22.8
40 to 49	19.6	21.1	23.9	25.9	26.9	28.8	26.5
50 to 64	32.5	31.5	32.2	28.6	29.9	23.8	23.5
65 and older	19.1	16.9	17.5	14.9	13.0	12.3	12.3
S6 Home Ownership status							
Own	70.3	69.5	79.9	72.0	75.3	66.5	N/A
Rent	29.7	30.5	20.1	28.0	24.7	33.5	N/A

Table 23 presents the key demographic and background information that was collected during the survey of residents. Some information was gathered during the interview, whereas other information was available from the voter file. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of registered voters in the City of Lake Forest. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics.

TABLE 24 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2014 ~ 2000)

Study Year	2014	2012	2010	2008	2006	2004	2002	2000
Total Respondents	200	200	200	200	200	200	200	200
QD1 Number of employees								
1	21.3	14.2	20.8	N/A	N/A	N/A	N/A	N/A
2 to 5	38.3	34.9	37.1	N/A	N/A	N/A	N/A	N/A
6 to 10	17.2	17.0	12.7	N/A	N/A	N/A	N/A	N/A
More than 10	19.9	31.7	26.7	N/A	N/A	N/A	N/A	N/A
Refused	3.3	2.2	2.7	N/A	N/A	N/A	N/A	N/A
QD2 Number of employees live outside Lake Forest								
None	28.6	15.1	27.2	N/A	N/A	N/A	N/A	N/A
1	16.7	15.5	11.0	N/A	N/A	N/A	N/A	N/A
2 to 5	24.2	29.3	28.3	N/A	N/A	N/A	N/A	N/A
6 to 10	13.9	14.6	10.9	N/A	N/A	N/A	N/A	N/A
More than 10	14.0	20.7	19.5	N/A	N/A	N/A	N/A	N/A
Refused	2.7	4.8	3.1	N/A	N/A	N/A	N/A	N/A
QD9 Resident of Lake Forest								
Yes	44.7	34.2	47.2	34.5	30.5	23.5	42.5	N/A
No	54.1	65.8	52.8	63.5	68.5	76.5	55.0	N/A
Refused	1.2	0.0	0.0	2.0	1.0	0.0	2.5	N/A
QS1 Gender								
Male	58.8	58.1	64.1	58.0	58.0	57.0	68.0	71.0
Female	41.2	41.9	35.9	42.0	42.0	43.0	32.0	29.0
QS2 Business category								
C-FR	5.8	7.5	6.2	8.5	6.0	4.5	4.5	N/A
C-Southwest	9.5	10.0	12.6	8.5	8.5	8.0	8.0	N/A
C-Midcity	10.4	12.5	11.7	8.0	8.0	8.5	10.0	N/A
C-RDA	7.5	12.5	7.7	10.5	11.0	11.5	12.5	N/A
Home-operated	29.0	15.0	27.3	15.0	12.5	12.5	13.0	N/A
I-AspenLambert	2.5	5.0	4.6	9.0	8.0	10.5	12.0	N/A
I-Midcity	2.3	10.0	2.6	12.5	13.0	18.0	20.5	N/A
I-FRPH	7.7	5.0	10.3	3.5	4.0	4.5	4.0	N/A
I-RDA	1.3	2.5	1.4	2.5	2.0	2.5	2.5	N/A
Office	20.8	15.0	12.6	11.5	17.5	17.5	11.0	N/A
Other	3.2	5.0	3.0	10.5	9.5	2.0	2.0	N/A

Table 24 provides information that was collected from local businesses during the 2014 survey, along with the results to similar questions asked in prior surveys (where applicable). The information presented in the table was gathered during the survey or from the City's database of local businesses.



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the City of Lake Forest to develop the resident and business questionnaires that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who had visited one of the City of Lake Forest's websites in the past year were asked about their satisfaction with the resources available on the sites. The questionnaires included with this report (see *Questionnaire & Toplines* on page 73) identify the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

Most of the questions asked in the 2014 survey were tracked directly from 2012 to allow the City to reliably track its performance over time.

CATI & PRE-TEST Prior to fielding the surveys, the questionnaires were CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the interviews, as well as web programmed to allow online participation when preferred. The CATI and web programs navigate skip patterns, randomize the appropriate question items, and alert the interviewer or respondent to certain types of keypunching mistakes should they occur. The integrity of the questionnaires was pre-tested internally by True North and also by dialing into random homes and businesses in the Lake Forest area prior to formally beginning the surveys.

SAMPLE The resident survey was conducted using a sample of 400 individuals drawn from the universe of registered voters in the City. Consistent with the profile of this universe, a total of 400 clusters were defined, each representing a particular combination of age, gender, partisanship, household party-type, and geographic location within the City. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refused to participate in the study, they were replaced by an individual with a similar profile.

For the business survey, 200 business owners or managers completed the interview, representing a total of approximately 3,800 companies that appear in the City's business database with viable contact information. Because of the large percentage of home-based businesses in the City, the sample was not drawn in a strictly proportional manner. A total of 34 interviews were collected among home-based businesses, with the remaining 166 interviews drawn proportionately from non home-based businesses stratified according to their type and location within the City. The groups are listed as follows on the next page.

- C-FR: Commercial businesses located in shopping centers in Foothill Ranch, north of the 241 toll road.
- C-Southwest: Commercial businesses located in the shopping centers between Interstate 5 and the railroad tracks, excluding the RDA project area (see below).
- C-Midcity: Commercial businesses located in the shopping centers between the railroad tracks and the 241 toll road, excluding the RDA project area (see below).
- C-RDA: Commercial businesses located in shopping centers in the redevelopment project area (RDA).
- Homeoccs: Home-based businesses.
- I-AspandLambert: Industrial businesses located in business parks and industrial areas near Aspan and Lambert.
- I-Midcity: Industrial businesses located in industrial areas between Trabucco and the 241 toll road, excluding the RDA project area.
- I-FRPH: Industrial businesses located in business parks and industrial areas north of the 241 toll road.
- I-RDA: Industrial businesses located in industrial areas within the redevelopment project area (RDA).
- Office: Office buildings.
- Other: Businesses that do not fit into one of the aforementioned categories.

MARGIN OF ERROR By using stratified and clustered samples and monitoring the sample characteristics as data collection proceeded, True North ensured the samples were representative of registered voters and business managers in the City of Lake Forest. The results of the surveys can thus be used to estimate the opinions of *all* registered voters and businesses in the City. Because not every voter and business in the City participated, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found, for example, in the survey of 400 voters for a particular question and what would have been found if all 39,000 voters in Lake Forest had been surveyed.

For example, in estimating the percentage of registered voters who have visited the City of Lake Forest’s Facebook page in the past year (Question 23 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

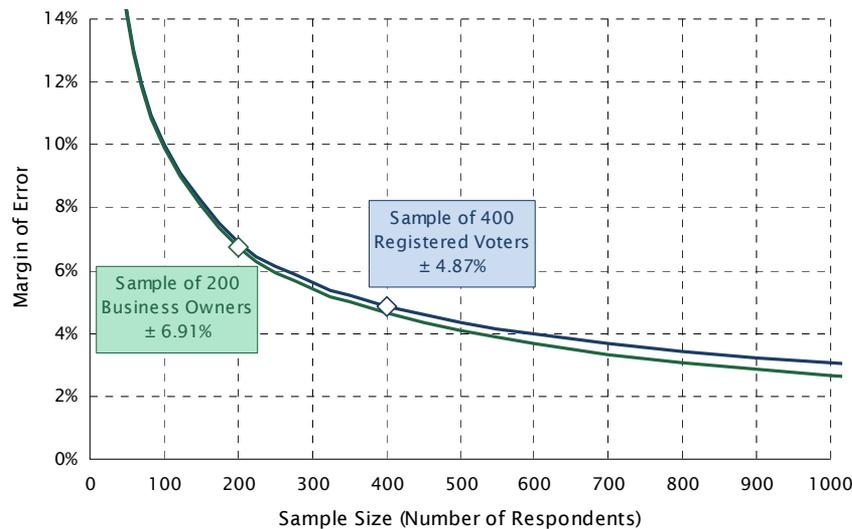
$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

where \hat{p} is the proportion of voters who have visited the City’s Facebook page in the past year (0.12 for 12% in this example), N is the population size of all registered voters (39,000), n is the sample size that received the question (400), and t is the upper $\alpha/2$ point for the t-distribution with $n-1$ degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of $\pm 3.17\%$. This means that with 12% of resident survey respondents indicating they visited the City’s Facebook page in the past year, we can be 95%

confident that the actual percentage of all registered voters who visited the Facebook page during that period is between 9% and 15%.

Table 71 presents the margin of error equation as a graph, plotting sample sizes along the bottom axis. There are two lines represented in the graph, which partially overlap—one for the resident survey and one for the business survey. As shown in the figure, the maximum margin of error in the resident survey for questions answered by all 400 registered voters is $\pm 4.87\%$, and the maximum margin of error for questions answered by all 200 business managers is $\pm 6.91\%$.

FIGURE 71 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by subgroups such as years living in Lake Forest, age of the respondent, and household income. Figure 71 above is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or within a particular subgroup) shrinks. Because the margin of error grows exponentially as sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA COLLECTION Consistent with the prior studies, the primary mode of data collection was telephone interviewing. To maximize response rates and the convenience of participating in the study, the 2014 surveys were also made available online to sampled residents and businesses.

Telephone interviews for the resident survey were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) between November 20 and November 30, 2014. It is standard practice not to call during the day on weekdays for resident surveys because most working adults are unavailable and thus calling during those hours would bias the sample. Resident interviews averaged 20 minutes in length.

The business survey was administered via telephone and via the web. Calls were made primarily during normal business hours between November 29, 2014 and January 9, 2015. Data collection was suspended for the Thanksgiving, Christmas, and New Year's holidays. The business interviews averaged 18 minutes in length.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and crosstabulations. Where appropriate, tests of statistical significance were conducted to evaluate whether a change in responses between 2012 and 2014 was due to an actual change in opinions or likely an artifact of independently-drawn cross-sectional samples.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

QUESTIONNAIRE & TOPLINES



City of Lake Forest
Voter Survey
Final Toplines
December 2014

Section 1: Introduction to Study

Hello, may I please speak to _____. Hi, my name is _____ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a survey about issues in your community and we would like to get your opinions.

If needed: This is a survey about important issues in Lake Forest - I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take around 15 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: General Perception of City & Local Issues

I'd like to begin by asking you a few questions about what it is like to live in the City of Lake Forest.

Q1	First, how long have you lived in the Lake Forest area?	
1	Less than 5 years	18%
2	5 years to less than 10 years	18%
3	10 years to less than 15 years	15%
4	15 or more years	48%
99	Refused	1%
Q2	How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?	
1	Excellent	55%
2	Good	37%
3	Fair	8%
4	Poor	0%
5	Very Poor	0%
98	Not sure	0%
99	Refused	0%

Q3 If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see? Verbatim responses recorded and grouped into categories shown below.		
	Not sure / Cannot think of anything	21%
	No changes needed	16%
	Reduce traffic congestion	14%
	Improve parks, recreation	11%
	Limit growth, development	8%
	Improve public safety	5%
	Improve, repair infrastructure	5%
	Improve education	5%
	Clean up, improve appearance	3%
	Improve environmental efforts	3%
	Other change	3%
	Reduce taxes, fees	1%
	Provide more public transit	1%
	Provide more parking	1%
	Attract new restaurants	1%
	Provide more affordable housing	1%
	Address illegal immigration issue	1%
	Provide more community-focused events	1%
	Support, assist local businesses	1%
	Attract, encourage new development	1%
	Improve outreach, communication	1%
Q4 Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
1	Very satisfied	57%
2	Somewhat satisfied	33%
3	Somewhat dissatisfied	2%
4	Very dissatisfied	2%
98	Not sure	6%
99	Refused	0%

Section 3: Police Department							
Q5	Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?						
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Providing neighborhood watch programs	17%	41%	32%	8%	1%	0%
B	Investigating criminal activity	43%	47%	7%	2%	2%	0%
C	Providing child safety programs	25%	40%	21%	8%	6%	0%
D	Enforcing traffic laws	22%	42%	28%	6%	2%	0%
E	Maintaining a low crime rate	44%	46%	7%	2%	1%	0%
F	Preparing for emergencies	33%	45%	18%	3%	1%	0%
G	Providing crossing guards near schools	29%	43%	17%	9%	2%	0%
H	Providing animal control services	14%	36%	37%	10%	3%	0%
Q6	For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide neighborhood watch programs	33%	32%	8%	1%	24%	1%
B	Investigate criminal activity	40%	29%	3%	2%	27%	0%
C	Provide child safety programs	32%	22%	1%	1%	42%	1%
D	Enforce traffic laws	48%	36%	4%	2%	10%	0%
E	Maintain a low crime rate	60%	27%	2%	2%	9%	1%
F	Prepare for emergencies	33%	31%	3%	1%	31%	1%
G	Provide crossing guards near schools	56%	24%	2%	1%	16%	1%
H	Provide animal control services	40%	29%	3%	3%	25%	0%

Section 4: Development Services							
Q7		Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.					
		Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Issuing building permits	12%	36%	29%	12%	10%	0%
B	Inspecting buildings	18%	38%	30%	7%	7%	0%
C	Enforcing zoning regulations	15%	38%	30%	11%	6%	0%
D	Enforcing sign regulations	11%	37%	35%	10%	6%	0%
Q8		Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Issue building permits	19%	22%	3%	4%	51%	1%
B	Inspect buildings	17%	24%	2%	2%	55%	1%
C	Enforce zoning regulations	19%	27%	3%	4%	46%	1%
D	Enforce sign regulations	26%	27%	4%	2%	41%	1%
Q9		In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?					
	1	Yes	8%				
	2	No	91%				
	98	Not sure	1%				
	99	Refused	0%				

Section 5: Public Works Department							
Q10		Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important.					
		Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Street sweeping	16%	45%	30%	6%	3%	0%
B	Maintaining trees	23%	47%	25%	3%	2%	0%
C	Preventing storm-water pollution	28%	46%	19%	5%	2%	0%
D	Reducing traffic congestion	33%	49%	12%	2%	3%	0%
E	Maintaining local streets and roads	30%	59%	9%	1%	2%	0%
F	Providing bike paths and pedestrian facilities	25%	42%	24%	6%	2%	0%
G	Maintaining parks and picnic areas	23%	52%	21%	2%	2%	0%
H	Maintaining public landscapes	18%	46%	27%	6%	2%	0%
I	Garbage collection services	35%	52%	9%	1%	2%	0%
J	Recycling services	26%	47%	20%	5%	2%	0%
Q11		Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide street sweeping services	59%	29%	3%	1%	8%	0%
B	Maintain trees	53%	34%	3%	2%	8%	0%
C	Prevent storm-water pollution	30%	31%	3%	2%	33%	2%
D	Reduce traffic congestion	24%	43%	14%	11%	8%	0%
E	Maintain local streets and roads	54%	36%	4%	2%	4%	0%
F	Provide bike paths and pedestrian facilities	47%	36%	4%	1%	11%	0%
G	Maintain parks and picnic areas	60%	31%	2%	1%	5%	0%
H	Maintain public landscapes	56%	33%	3%	1%	6%	0%
I	Provide garbage collection services	64%	25%	2%	2%	6%	0%
J	Provide recycling services	54%	33%	3%	2%	8%	0%

Section 6: Community Services Department							
Q12		<p>Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p>					
<i>Read in Order</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Providing after school recreation programs	22%	34%	20%	19%	4%	0%
B	Providing recreation programs for pre-school children	16%	33%	24%	21%	5%	0%
C	Providing recreation and sports programs for elementary school-aged children	20%	44%	21%	11%	4%	0%
D	Providing recreation and sports programs for teens	22%	44%	21%	9%	3%	0%
E	Providing adult recreation programs such as classes, concerts and trips	13%	35%	34%	15%	3%	0%
F	Providing adult sports programs	9%	29%	38%	22%	3%	0%
G	Providing recreation programs for seniors	16%	40%	29%	13%	2%	0%
H	Providing recreation programs for families	13%	38%	32%	15%	2%	0%
I	Providing special events like concerts in the park and the Fourth of July Parade	20%	42%	28%	8%	2%	0%
J	Providing recreation programs for special needs children	21%	51%	18%	8%	2%	0%
K	Providing summer-specific recreation programs such as camps	13%	36%	31%	16%	4%	0%
Q13		<p>Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services.</p> <p>Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i></p>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide after school recreation programs	32%	21%	6%	1%	39%	0%
B	Provide recreation programs for pre-school children	29%	19%	6%	1%	45%	0%
C	Provide recreation and sports programs for elementary school-aged children	33%	23%	3%	1%	38%	1%
D	Provide recreation and sports programs for teens	32%	26%	2%	3%	37%	0%

E	Provide adult recreation programs such as classes, concerts and trips	32%	28%	3%	3%	34%	0%
F	Provide adult sports programs	25%	24%	5%	2%	44%	1%
G	Provide recreation programs for seniors	28%	20%	4%	2%	45%	1%
H	Provide recreation programs for families	27%	29%	4%	2%	37%	1%
I	Provide special events like concerts in the park and the Fourth of July Parade	53%	25%	4%	3%	15%	0%
J	Provide recreation programs for special needs children	22%	18%	6%	3%	51%	0%
K	Provide summer-specific recreation programs such as camps	25%	24%	6%	1%	44%	0%

Section 7: Recreation

The City of Lake Forest has the financial resources to provide some of the recreational amenities and facilities desired by residents. Because it can't fund every project, however, the City must set priorities.

Q14 As I read each of the following items, I'd like you to indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future City spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.

Here is the (first/next) one: _____. Should this item be a high, medium or low priority for the City - or should the City not spend any money on this item?

		High Priority	Medium Priority	Low Priority	Should not spend money	Not sure	Refused
	<i>Randomize</i>						
A	Expand and improve the network of walking, hiking and biking trails	35%	40%	18%	6%	1%	0%
B	Provide community gardens	21%	31%	35%	11%	3%	0%
C	Provide off-leash dog park facilities	22%	34%	30%	10%	3%	0%
D	Provide additional sports courts	17%	36%	32%	12%	3%	0%
E	Provide a community swimming pool	23%	31%	31%	13%	1%	0%
F	Provide a splash pad	7%	13%	27%	15%	33%	5%
G	Add and upgrade playground equipment at existing parks	30%	42%	20%	6%	1%	0%
H	Provide additional outdoor exercise equipment	16%	30%	41%	12%	1%	0%
I	Provide a rink and activities like roller skating, roller hockey and arena soccer	15%	33%	38%	13%	1%	0%

Section 8: Traffic																																					
Q15	Next, I'd like to ask you about traffic congestion. When you are driving: _____, about what percentage of your trips do you encounter <u>bad</u> traffic congestion? <i>If needed:</i> Zero percent means you never encounter bad traffic congestion, whereas 100% means you always encounter bad traffic. You can use any number between 0 and 100.																																				
	<table border="1"> <thead> <tr> <th colspan="2"><i>Read in Order</i></th> <th>Average Percentage of Trips</th> <th>Less than 10%</th> <th>10% to 24%</th> <th>25% to 49%</th> <th>50% to 74%</th> <th>75% or higher</th> <th>Not sure / Refused</th> </tr> </thead> <tbody> <tr> <td>A</td> <td>On Orange County Freeways</td> <td>55.9%</td> <td>4%</td> <td>10%</td> <td>15%</td> <td>32%</td> <td>31%</td> <td>7%</td> </tr> <tr> <td>B</td> <td>On major streets within Lake Forest</td> <td>45.4%</td> <td>6%</td> <td>17%</td> <td>22%</td> <td>33%</td> <td>17%</td> <td>4%</td> </tr> <tr> <td>C</td> <td>In residential areas within Lake Forest</td> <td>20.2%</td> <td>34%</td> <td>31%</td> <td>13%</td> <td>12%</td> <td>4%</td> <td>5%</td> </tr> </tbody> </table>	<i>Read in Order</i>		Average Percentage of Trips	Less than 10%	10% to 24%	25% to 49%	50% to 74%	75% or higher	Not sure / Refused	A	On Orange County Freeways	55.9%	4%	10%	15%	32%	31%	7%	B	On major streets within Lake Forest	45.4%	6%	17%	22%	33%	17%	4%	C	In residential areas within Lake Forest	20.2%	34%	31%	13%	12%	4%	5%
<i>Read in Order</i>		Average Percentage of Trips	Less than 10%	10% to 24%	25% to 49%	50% to 74%	75% or higher	Not sure / Refused																													
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C	In residential areas within Lake Forest	20.2%	34%	31%	13%	12%	4%	5%																													
Q16	When compared to traffic congestion in other Orange County cities, would you say that the amount of traffic congestion <u>within</u> Lake Forest is less, about the same, or more?																																				
	<table border="1"> <tbody> <tr> <td>1</td> <td>Less</td> <td>45%</td> </tr> <tr> <td>2</td> <td>About the same</td> <td>39%</td> </tr> <tr> <td>3</td> <td>More</td> <td>14%</td> </tr> <tr> <td>98</td> <td>Not sure</td> <td>2%</td> </tr> <tr> <td>99</td> <td>Refused</td> <td>0%</td> </tr> </tbody> </table>	1	Less	45%	2	About the same	39%	3	More	14%	98	Not sure	2%	99	Refused	0%																					
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2	About the same	39%																																			
3	More	14%																																			
98	Not sure	2%																																			
99	Refused	0%																																			
Q17	Generally speaking, are you satisfied or dissatisfied with the City's efforts to improve traffic circulation by improving roads and intersections, timing traffic signals, and other measures? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?																																				
	<table border="1"> <tbody> <tr> <td>1</td> <td>Very satisfied</td> <td>34%</td> </tr> <tr> <td>2</td> <td>Somewhat satisfied</td> <td>38%</td> </tr> <tr> <td>3</td> <td>Somewhat dissatisfied</td> <td>16%</td> </tr> <tr> <td>4</td> <td>Very dissatisfied</td> <td>10%</td> </tr> <tr> <td>98</td> <td>Not sure</td> <td>2%</td> </tr> <tr> <td>99</td> <td>Refused</td> <td>0%</td> </tr> </tbody> </table>	1	Very satisfied	34%	2	Somewhat satisfied	38%	3	Somewhat dissatisfied	16%	4	Very dissatisfied	10%	98	Not sure	2%	99	Refused	0%																		
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4	Very dissatisfied	10%																																			
98	Not sure	2%																																			
99	Refused	0%																																			
Q18	If the City could fund only one traffic or transportation-related project, what should it be? Please be specific. <i>Verbatim responses recorded and grouped into categories shown below.</i>																																				
	<table border="1"> <tbody> <tr> <td>Not sure / Cannot think of anything</td> <td>29%</td> </tr> <tr> <td>Synchronize traffic signals</td> <td>22%</td> </tr> <tr> <td>Improve, repair streets and roads</td> <td>19%</td> </tr> <tr> <td>Improve public transit services</td> <td>10%</td> </tr> <tr> <td>Reduce traffic congestion in general</td> <td>10%</td> </tr> <tr> <td>No need / Should not fund transportation project</td> <td>9%</td> </tr> <tr> <td>Limit growth, development</td> <td>1%</td> </tr> </tbody> </table>	Not sure / Cannot think of anything	29%	Synchronize traffic signals	22%	Improve, repair streets and roads	19%	Improve public transit services	10%	Reduce traffic congestion in general	10%	No need / Should not fund transportation project	9%	Limit growth, development	1%																						
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Section 9: City-Resident Communication		
Q19	Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means? <i>Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>	
	1	Very satisfied 44%
	2	Somewhat satisfied 38%
	3	Somewhat dissatisfied 8%
	4	Very dissatisfied 4%
	98	Not sure 6%
	99	Refused 0%
Q20	What information sources do you use to find out about City of Lake Forest news, information and programming? <i>Don't read list. Record up to first 2 responses. If they say Internet or web, probe to see if a City website and - if yes - which one.</i>	
	1	Saddleback Valley News 3%
	2	Orange County Register 8%
	3	Los Angeles Times 2%
	4	The Leaflet - City Newsletter 18%
	5	Leisure Times - City Newsletter 4%
	6	City Newsletter - no mention of Leaflet or Leisure Times 19%
	7	E-newsletter - electronic newsletter 6%
	8	Lake Forest Patch - <i>the Patch</i> 6%
	9	City Council Meetings 1%
	10	Radio 1%
	11	Television 3%
	12	Internet, not a City site 22%
	13	City Website (not specific) 14%
	14	Skatepark site (Etnies) 0%
	15	Lake Forest Seniors site 0%
	16	Lake Forest Teens site 0%
	17	Main City Web Page/ Ask Lake Forest 1%
	18	Economic Development site/Lake Forest Business 0%
	19	Flyers at City Facilities 4%
	20	Friends / Other People 2%
	21	Facebook/Twitter or other social media 3%
	22	Other 5%
	23	Do Not Receive Information about City 5%

	98	Not sure				5%
	99	Refused				1%
Q21	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?					
	1	Yes				52%
	2	No				46%
	98	Not sure				2%
	99	Refused				0%
Q22	Are you satisfied or dissatisfied with the resources and content available on the City's web sites? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
	1	Very satisfied				47%
	2	Somewhat satisfied				40%
	3	Somewhat dissatisfied				9%
	4	Very dissatisfied				2%
	98	Not sure				1%
	99	Refused				0%
Q23	In the past year, have you visited City of Lake Forest's Facebook page?					
	1	Yes				12%
	2	No				87%
	98	Not sure				1%
	99	Refused				0%
Q24	As I read the following ways that the City of Lake Forest can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with you.					
		<i>Randomize</i>	Very	Somewhat	Not at all	Not sure / Refused
A	E-mail		38%	34%	23%	5%
B	Electronic Newsletters		32%	39%	24%	5%
C	Twitter		10%	24%	59%	8%
D	Facebook		23%	32%	40%	4%
E	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates		43%	23%	29%	5%
F	City website		39%	38%	20%	3%
G	Newsletters and other materials mailed directly to your house		62%	27%	9%	2%
H	Automated phone calls		20%	21%	56%	4%

I	Town hall and community meetings	22%	44%	30%	4%
J	Advertisements in local papers	19%	34%	43%	4%
K	Public Access Television	19%	28%	49%	4%

Section 10: Background/Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	50%
	2	Employed part-time	9%
	3	Student	4%
	4	Homemaker	9%
	5	Retired	20%
	6	In-between jobs	4%
	98	Not sure	0%
	99	Refused	3%
D2	Do you currently have any children under the age of 18 living in your home?		
	1	Yes	36%
	2	No	60%
	99	Refused	4%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?		
	1	Yes	69%
	2	No	27%
	99	Refused	4%

D4	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.		
	1	Under \$40,000	10%
	2	\$40,000 to \$59,999	12%
	3	\$60,000 to \$79,999	10%
	4	\$80,000 to \$99,999	12%
	5	\$100,000 or more	36%
	98	Not sure	5%
	99	Refused	16%

Thank you for participating! This survey was conducted for the City of Lake Forest.

Section 11: Post-Interview & Sample Items

D5	Gender		
	1	Male	46%
	2	Female	54%
S1	Party		
	1	Democrat	30%
	2	Republican	39%
	3	Other	4%
	4	DTS	27%
S2	Age		
	1	18-29	15%
	2	30-39	14%
	3	40-49	20%
	4	50-64	32%
	5	65 or older	19%
	99	Not coded	0%

S3 Registration Date		
	2014 to 2009	41%
	2008 to 2005	19%
	2004 to 2001	14%
	2000 to 1997	9%
	Before 1997	17%
S4 Household Party Type		
	1 Single Dem	14%
	2 Dual Dem	8%
	3 Single Rep	16%
	4 Dual Rep	17%
	5 Single Other	17%
	6 Dual Other	6%
	7 Dem & Rep	5%
	8 Dem & Other	9%
	9 Rep & Other	7%
	0 Mixed (Dem + Rep + Other)	2%
S5 Likely to Vote by Mail		
	1 Yes	27%
	0 No	73%
S6 Home Owner		
	1 Yes	70%
	2 No	30%
S7 Area of City		
	1 One	23%
	2 Two	22%
	3 Three	31%
	4 Four	24%



City of Lake Forest
Business Survey
Final Toplines
January 2015

Section 1: Introduction to Study

Hello, may I please speak to _____. Hi, my name is _____ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a short survey on issues of importance to businesses in Lake Forest and would like to get your opinions.

If needed: This is a survey about important business issues in Lake Forest – I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take around 10 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back, or you can take the survey online at <<insert URL>> and enter <<PIN>>.

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: Business Climate

I'd like to begin by asking you a few questions about what it is like to conduct business in the City of Lake Forest.

Q1 First, how long has your business operated in Lake Forest?

1	Less than 5 years	29%
2	5 years to less than 10 years	24%
3	10 years to less than 15 years	13%
4	15 or more years	32%
99	Don't Know/Refused	2%

Q2 How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

1	Excellent	25%
2	Good	50%
3	Fair	13%
4	Poor	2%
5	Very poor	0%
98	Don't Know	9%
99	Refused	0%

Q3	If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of any	28%
	No changes / Everything is okay	23%
	Increase biz, networking opportunities	12%
	Reduce signage restrictions	11%
	Improve, add parking	9%
	Prefer not to answer	9%
	Improve safety, security of biz areas	8%
	Reduce taxes, fees	7%
	More business-friendly government	4%
	Provide additional community events	3%
	Repair, maintain roads	2%
	Fewer restrictions, regulations	2%
	Reduce rent, lease fees	1%
Q4	Is there a particular aspect or feature of Lake Forest that is beneficial to your business? If yes, ask: Please describe the aspects of Lake Forest that most benefit your business. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular aspect	34%
	Access to other local businesses, services	18%
	Good location / Convenient access for customers	15%
	Sense of community / Family-oriented City	11%
	No business license / Ease of startup	10%
	Access to roads, freeways, surrounding communities	9%
	Cleanliness, beauty of City	5%
	Growth in business, residential areas	3%
	Public safety / Low crime rate	2%
	Easy access to online information, advertising	2%

Q5	Are there any particular challenges associated with doing business in Lake Forest? <i>If yes, ask:</i> Please briefly describe the particular challenges associated with doing business in Lake Forest. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of any	71%
	Location, accessibility	7%
	Advertisement restrictions	5%
	Too many regulations	4%
	Business competition	4%
	High expenses, rents, fees	3%
	Population, demographic concerns	2%
	Illegal immigrant issue	2%
	Traffic, parking issues	2%
City maintenance, infrastructure	1%	

Section 3: City Services

Q6	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? (<i>get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?)		
	1	Very satisfied	61%
	2	Somewhat satisfied	26%
	3	Somewhat dissatisfied	5%
	4	Very dissatisfied	2%
	98	Don't Know	5%
	99	Refused	2%

Q7 Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.
Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?

<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Providing business watch programs	8%	29%	32%	25%	5%	1%
B	Investigating criminal activity	36%	50%	7%	5%	2%	0%
C	Enforcing traffic laws	17%	40%	29%	13%	1%	0%
D	Maintaining a low crime rate	41%	51%	5%	3%	0%	0%
E	Providing building permit services	10%	32%	30%	22%	5%	1%

F	Providing building inspection services	7%	31%	33%	25%	4%	0%
G	Promoting economic development	23%	45%	19%	11%	1%	0%
H	Revitalizing out-dated areas in the City	20%	47%	18%	13%	1%	0%
I	Providing business education events	9%	27%	36%	28%	1%	0%
J	Providing business networking events	8%	30%	39%	22%	0%	0%
K	Providing free business consulting services	10%	25%	36%	29%	1%	0%
<p>For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service.</p> <p>Q8 Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p>							
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Provide business watch programs	28%	36%	4%	1%	29%	2%
B	Investigate criminal activity	47%	35%	3%	1%	13%	1%
C	Enforce traffic laws	48%	37%	7%	2%	5%	1%
D	Maintain a low crime rate	66%	24%	3%	1%	4%	1%
E	Provide building permit services	31%	36%	4%	1%	26%	2%
F	Provide building inspection services	30%	38%	3%	1%	27%	1%
G	Promote economic development	44%	40%	5%	2%	9%	1%
H	Revitalize out-dated areas in the City	45%	35%	5%	3%	10%	1%
I	Provide business education events	34%	40%	3%	2%	20%	1%
J	Provide business networking events	38%	37%	5%	1%	17%	1%
K	Provide free business consulting services	29%	36%	4%	1%	29%	1%
<p>Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.</p> <p>Q9 Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p>							
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	No Opinion	Refused
A	Enforcing zoning regulations	14%	35%	30%	20%	1%	0%
B	Enforcing sign regulations	11%	38%	27%	22%	2%	0%
C	Street sweeping	12%	40%	27%	20%	2%	0%
D	Reducing traffic congestion	26%	51%	12%	11%	0%	0%

E	Maintaining local streets and roads	28%	52%	9%	10%	0%	0%
F	Landscaping median strips and other areas of the City	13%	34%	32%	18%	2%	0%
Q10	Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	No Opinion	Refused
A	Enforce zoning regulations	35%	40%	2%	1%	20%	1%
B	Enforce sign regulations	31%	44%	7%	4%	13%	1%
C	Provide street sweeping services	49%	38%	2%	1%	10%	1%
D	Reduce traffic congestion	26%	47%	16%	5%	5%	1%
E	Maintain local streets and roads	55%	38%	3%	2%	1%	1%
F	Landscape median strips and other areas of the City	52%	39%	2%	3%	4%	1%

Section 4: City-Business Communication

Q11	Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means? Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?			
	1	Very satisfied	51%	Skip to Q13
	2	Somewhat satisfied	37%	Skip to Q13
	3	Somewhat dissatisfied	7%	Ask Q12
	4	Very dissatisfied	1%	Ask Q12
	98	Don't Know	4%	Skip to Q13
	99	Refused	0%	Skip to Q13
Q12	Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Please be specific. Verbatim responses for the 9 dissatisfied customers presented below.			
	<i>I cannot think of one time that the city tried to communicate with us.</i>			
	<i>I don't communicate with them too much because of one time when I reached out to them. We had a security breach, and the door wouldn't close all the way. I reached out to the police department and asked them to drive by during the night. They flat out refused and were very rude. They refused to send anyone during the night, but, the following day, the police hung out by my store for two hours and handed out violations.</i>			
	<i>I don't get any kind of mailings or anything like that.</i>			
	<i>I haven't really received any kind of communication from them.</i>			
	<i>I would like to see more social media and more e-information. They do a good job with magazines.</i>			
	<i>The city has never communicated with my business.</i>			

	<i>They are not that many events. There has only been one or two in the last year.</i>	
	<i>They do not publicize when they're having counsel or town meetings that are open to the public.</i>	
	<i>We don't ever see anything from the city by postal or electronic mail here. All our bills go directly to our main office.</i>	
Q13	What information sources do you use to find out about City of Lake Forest news, information and programming? <i>Don't read list. Record up to first 2 responses.</i>	
	<i>If they say Internet or web, probe to see if a City website and – if yes – which one.</i>	
	1	Saddleback Valley News (paper) 5%
	2	Orange County Register (paper) 10%
	3	Los Angeles Times (paper) 1%
	4	The Leaflet – City Newsletter 24%
	5	Leisure Times – City Newsletter 3%
	6	City Newsletter – no mention of Leaflet or Leisure Times 19%
	7	E-newsletter – electronic newsletter 23%
	8	Lake Forest Patch – the Patch 8%
	9	City Council Meetings 0%
	10	Radio 0%
	11	Television 0%
	12	Internet, not a City site 13%
	13	City Website (not specific) 25%
	14	Skatepark site (Etnies) 0%
	15	Lake Forest Seniors site 0%
	16	Lake Forest Teens site 0%
	17	Main City Web Page/ Gov Populous 2%
	18	Flyers at City Facilities 2%
	19	Friends / Other People 3%
	20	Facebook/Twitter or other social media 3%
	21	Other 9%
	22	Do Not Receive Information about City 5%
	98	Not sure 2%
	99	Refused 0%

Q14 As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.					
<i>Randomize</i>		Very	Somewhat	Not at all	Not sure / Refused
A	E-mail	61%	28%	11%	0%
B	Electronic Newsletters	49%	39%	9%	2%
C	Twitter	10%	25%	63%	3%
D	Facebook	19%	36%	42%	2%
E	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates	41%	30%	26%	3%
F	City website	54%	30%	13%	2%
G	A Blog on the City's website	27%	42%	29%	2%
H	Newsletters and other materials mailed directly to your business	54%	38%	6%	2%
I	Automated phone calls	11%	26%	61%	2%
J	Town hall and community meetings	31%	45%	20%	5%
K	Advertisements in local papers	17%	38%	44%	1%
L	Public Access Television	11%	26%	60%	4%
Q15 Have you ever visited the City's economic development website at www.lakeforestbusiness.com ?					
	1	Yes	42%		
	2	No	58%		
	99	Refused	0%		
Q16 The City wants to ensure that the economic development website is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.					
<i>Randomize</i>		Very Interested	Somewhat Interested	Not Interested	Not sure / Refused
A	Information on starting a business in Lake Forest	33%	34%	32%	1%
B	Company testimonials	21%	43%	35%	1%
C	Business and Financial Resources Guides	40%	38%	20%	2%
D	Business success stories	29%	45%	25%	2%
E	News stories on grand openings and ribbon-cuttings	32%	41%	26%	1%
F	Shop and Dine directory of local businesses	49%	34%	16%	2%

G	Commercial property for lease or sale	27%	36%	35%	1%
H	Information on business seminars and workshops	39%	35%	25%	1%
Q17	Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? <i>If yes, ask: Please briefly describe it to me.</i>				
	Verbatim responses recorded	Data for 24 respondents on file			
	2 No additional topics	83%			
	98 Not sure	6%			
	99 Refused	1%			
Q18	The City of Lake Forest also hosts a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.				
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Not sure / Refused
A	Starting a business and developing a business plan	23%	27%	50%	1%
B	Understanding business finance	24%	30%	45%	1%
C	Business job fair and expo	26%	33%	41%	1%
D	Payroll and tax reporting requirements	24%	25%	50%	1%
E	Business marketing and sales	37%	35%	28%	1%
F	Business legal issues	25%	32%	42%	1%
G	Business networking events	35%	38%	27%	1%
H	Roundtable discussion on specific topics	19%	37%	44%	1%
I	Social Media and Marketing	31%	34%	34%	1%
J	Importing and Exporting	10%	17%	72%	1%

Section 5: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	How many people are currently employed at your worksite in Lake Forest?	
	1	21%
	2 to 5	38%
	6 to 10	17%
	More than 10	20%
	Refused	3%

D2	Approximately how many of these employees live outside of Lake Forest?			
	None		29%	
	1		17%	
	2 to 5		24%	
	6 to 10		14%	
	More than 10		14%	
	Refused		3%	
D3	What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? <i>Do not read list - record first response</i>			
	1	Competitive lease rates/building rents	7%	
	2	Quality business parks	1%	
	3	Proximity to freeways/transportation corridors	7%	
	4	Quality of housing stock	0%	
	5	Overall quality of the City	10%	
	6	Local amenities (dining/shopping)	4%	
	7	Close to clients/customers	12%	
	8	Close to owner's home	29%	
	9	Other	10%	
	10	Location, accessibility	9%	
	98	Not sure / Business already in place	10%	
D4	In the next 12 months, do you think your business will increase, decrease or stay about the same?			
	1	Increase	59%	Ask D5
	2	Decrease	3%	Skip to D6
	3	Stay about the same	37%	Skip to D6
	98	Don't know	2%	Skip to D6
	99	Refused	0%	Skip to D6
D5	To accommodate the growth in your business, will you require additional square footage or a larger building?			
	1	Yes	21%	
	2	No	76%	
	98	Don't know	2%	
	99	Refused	1%	

D6	In the next 12 months, do you think your business will relocate?			
	1	Yes	11%	Ask D7
	2	No	84%	Skip to D9
	98	Don't Know	4%	Skip to D9
	99	Refused	1%	Skip to D9
D7	Will you be relocating your business within Lake Forest or to another community?			
	1	Lake Forest	32%	Skip to D9
	2	Another community	51%	Ask D8
	98	Don't Know	17%	Skip to D9
	99	Refused	0%	Skip to D9
D8	Is there a particular reason why your business is leaving Lake Forest? <i>If yes, ask: Please describe the reason.</i>			
	Verbatim responses recorded		Data for 8 respondents on file	
D9	Last question for you. Are you a resident of Lake Forest?			
	1	Yes	45%	
	2	No	54%	
	99	Refused	1%	
Thank you for participating! This survey was conducted for the City of Lake Forest.				

Section 7: Post-Interview & Sample Items

S1	Gender (<i>Determined by voice of respondent</i>)		
	1	Male	58%
	2	Female	41%
	99	Refused	1%
S2	Business Subgroup		
	1	C-FR	6%
	2	C-Southwest	9%
	3	C-Midcity	10%
	4	C-RDA	8%
	5	Homeoccs	29%

City of Lake Forest Business Satisfaction Survey

January 2015

	6	I-AspenLambert	3%
	7	I-Midcity	2%
	8	I-FRPH	8%
	9	I-RDA	1%
	10	Office	21%
	11	Other	3%
S3	Business Category		
	1	Commercial	33%
	2	Home-operated	29%
	3	Industrial	14%
	4	Office	21%
	5	Other	3%

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